



Chief Executive Officer Job Description

Purpose of the Post: to lead Wealden Citizens Advice (WCA) strategically, ensuring delivery of a comprehensive advice service to people in the area of benefit within the aims, policies and principles of the Citizens Advice service, and to account to the Trustee Board for carrying out the activities listed below and advising the Board in carrying out its responsibilities.

1. Planning and Development The Chief Executive Officer will:

- Have responsibility for overall management and delivery of the Business Plan once it has been approved with the Trustee Board.
- Translate organisational objectives into team and individual work plans with clear and realistic targets.
- Be aware of the operating environment — including legislative developments, social trends and local needs — which may affect demand for advice and opportunities for service development and advise the Board accordingly.
- Research and respond to advice needs, in particular the needs of identified disadvantaged groups and the different geographical and demographical areas.
- Develop IT and other resource needs and strategies within Citizens Advice Guidelines.
- Ensure that the strategic development of the service, its management and its services to clients reflect and support the Citizens Advice service's equality and diversity strategy.
- Ensure an effective Business Continuity Plan is in place and responsibilities are understood by the relevant staff.
- Participate in Citizens Advice initiatives as appropriate and to contribute to the work of national and regional committees and working parties.

2. Supporting the Trustee Board The Chief Executive Officer will:

- Attend meetings of WCA Trustee Board; oversee arrangements for WCA's Annual General Meeting and any Special General Meetings; oversee the arrangement and servicing of meetings of the Trustee Board's committees.
- Provide relevant advice, information and professional support to trustees to ensure they are properly informed and advised on the discharge of their duties;

- Advise the Trustee Board on financial, managerial, staffing & service delivery issues.
- Report to the Trustee Board on progress against agreed objectives, including those of the Business Plan.
- Prepare and draft the WCA Annual Report for agreement by the Trustee Board.
- Support and advise the Trustee Board in the development of the strategic plan.
- Advise the Trustee Board on compliance with all relevant legislation and regulatory requirements (e.g. company and charity law, health & safety, employment).
- Assist and advise the Trustee Board on compliance with the Citizens Advice Membership Scheme.

3. Service Delivery The Chief Executive Officer will:

- Develop and maintain standards and quality of service delivery by:
 - evaluating their effectiveness
 - developing new methods of service delivery
 - ensuring that appropriate systems are developed and maintained for case recording, statistics, follow up work and quality control
 - consulting with staff, user groups and others
 - negotiating, monitoring and evaluating grant-in-aid conditions against service level agreements.
- Be aware of organisational and technical developments and ensure that the service makes the best possible use of the available resources.
- Ensure, delegating as appropriate, that each site is adequately managed, staffed and resourced.
- Develop and maintain common practices to ensure that standards of service delivery are met and that appropriate systems are in place for staff supervision, case recording, statistics, follow-up work and quality control.
- Identify opportunities to improve WCA's service delivery so as to meet local needs and to comply with membership requirements of Citizens Advice.
- Act as the SIRO for WCA ensuring information systems are secure.

4. Resource Acquisition & Financial Management The Chief Executive Officer will:

- Develop WCA's funding base by identifying funding opportunities consistent with its aims and the operating environment, and applying for funding as agreed by the Trustee Board.

- Negotiate and review all grants and service agreements in consultation with the Trustee Board, ensuring that existing services are adequately funded and appropriate grant applications made.
- Maintain appropriate relations with funders, fulfilling all reporting requirements and ensuring compliance with contracts.
- Maintain day-to-day financial control of the service within budget as agreed by the Trustee Board.
- Ensure that all finances are properly administered and monitored and that appropriate financial regulations and controls are in place and in use at all times.
- Advise the Trustee Board on the proper allocation of resources.
- Prepare and review detailed budgets in conjunction with the honorary treasurer, appropriate committee and auditors, and present them to the Trustee Board for approval.
- Report regularly to the Trustee Board on income, expenditure and any variations from budget.
- Oversee the preparation of accounts and financial statements in conjunction with the honorary treasurer, appropriate committee and auditors.
- Ensure that all financial reporting obligations are met in relation to submissions for funding, grant aid, contracts and any other initiatives.
- Act as cheque signatory & authorise expenditure up to limits agreed by the Trustee Board.

5. Staff Management The Chief Executive Officer will:

- Create a positive working environment in which equality and diversity are well-managed and are applied in the recruitment and management of staff and volunteers, and that staff are motivated to do their best.
- Establish and implement a recruitment, induction and staff development policy in conjunction with the appropriate committee.
- Ensure the effective performance management and development of all staff, through regular supervision sessions and the appraisal process.
- Regularly identify staff learning and development needs and ensure that they are met in accordance with Citizens Advice standards; ensure that each member of staff has a learning and development plan.
- Convene & chair regular meetings of the management team and of all paid & unpaid staff, and negotiate with the representatives of staff, unions & volunteers as required.
- In accordance with Citizens Advice and organisational procedures, assist the Trustee Board in implementing and monitoring employment policies and procedures.

- Act as Health and Safety Officer and ensure that H&S policies and procedures for staff, premises and equipment are agreed, maintained and comply with statutory requirements.

6. Public Relations, Campaigns & Research The Chief Executive Officer will:

- Promote and protect the aims, principles, interests and reputation of WCA & Citizens Advice both locally and nationally and ensure that WCA has a high profile at all times.
- Ensure the development of research & campaigns, and instigate systems and procedures in line with requirements of the membership scheme.
- Develop and oversee appropriate publicity through public speaking and effective relations with the media and community organisations.
- Develop effective relations with appropriate authorities, agencies, organisations and individuals at local and national levels, including Citizens Advice services in East Sussex, local councillors, MPs, MEPs, and local national statutory and non-statutory organisations.
- Liaise with Citizens Advice and contribute to its work at regional and national levels; where appropriate, represent WCA at Citizens Advice and other statutory, non-statutory, voluntary & commercial organisations, professional bodies and institutions.

7. Administration The Chief Executive Officer will:

- Establish, maintain and monitor effective administrative systems.
- Establish, maintain and monitor complaint procedures in accordance with Citizens Advice requirements.
- Ensure that the service is adequately accommodated and equipped to answer the needs of clients and staff and the effective operation of the service.
- Use ICT as required for the role.

8. Other Duties and Responsibilities The Chief Executive Officer will:

Undertake such other duties as may lie within the scope of the post to ensure the effective delivery and development of the service.