

# Chief Executive Recruitment Pack

**citizens  
advice**

**Birmingham**

Your Local Advice Charity  
Registered No: 519639

**Closing Date:**  
19/09/24 at 12 noon

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# Introduction

## Dear Candidate

Thank you for thinking about applying to be the next chief executive of Citizens Advice Birmingham. We've prepared this pack to help you decide whether this is the right role for you, and to help you submit the best possible application. If you have any questions, please let us know.

Citizens Advice Birmingham was founded 85 years ago. A great deal has changed since then, and demand for our services has only increased. Our team of staff and volunteers supported over 16,000 people in 2023/24 with over 102,000 issues, helping them find solutions to some of life's most challenging situations. You can read about some of our successes in our Impact Report <https://tinyurl.com/4f567pht>.

Whilst we are justly proud of our history, Birmingham, like every major city, is rapidly changing. To meet the challenges, we must be responsive and innovative in the way in which we deliver our service. This in turn means that our teams have to be open to working in new ways, enthusiastic about our service, and flexible in their approach.

Birmingham is the largest local authority in the country by population with over 1.1 million. Over the last decade, the population has increased by 6.7% and, while Birmingham is considered one of the youngest cities in Europe, the older population is growing rapidly too. Birmingham experiences elevated levels of deprivation with 43% of the population living in the 10% most deprived localities in England. It is also a culturally diverse city with citizens from ethnic minority backgrounds now making up 51.4% of the city's population. Over a hundred different languages are spoken across Birmingham and in some wards up to 80% of residents are from minority ethnic groups. The 2022 UK Thriving Places Index – capturing people, place, health, education and the local economy – showed that Birmingham residents are amongst the least well off in the country.

Citizens Advice Birmingham operates in an extremely challenging funding environment. We are faced with fewer funding opportunities year on year, we have not had core funding for many years and the funding that is available is often restricted to certain types of service or clients and, typically, does not provide for full cost recovery. We expect demand to increase whilst overall funding for advice services is likely to

continue to reduce. We are constantly seeking ways to be more effective with our resources to ensure we are able to provide value for money to our funders but also reliable and effective services to our clients.

Despite these challenges, Citizens Advice Birmingham is proud to deliver excellent services that are regularly recognised nationally as setting the standard for advice, and we are continuing to think about how we can innovate and do things differently to meet the needs of our citizens. You can see in our business plan how we are aiming to take a proactive, demand-led approach to identifying new opportunities that builds on our knowledge of the city's communities.

Our new chief executive will play a central role in leading our service through this challenging environment. They will develop and implement strategic plans that will secure the long term future of the service. We will look to them to build on the strong, supportive culture that underpins our successes, and to build robust, beneficial relationships with local funders, partners and influencers in the interests of our service.

Working at Citizens Advice Birmingham will bring you into contact with all types of people, with all their differing experiences. Those who work for us, either as paid employees or volunteers, are representative of the life of our city, diverse but sharing the same Citizens Advice values and ethos. This is the richness of our service – a service that is built entirely out of ordinary people helping ordinary people, every day, every week, every year. I hope you're excited by the opportunity of leading us through the next stage in our history.



**Liam Brooker**  
Chair of trustee board

# Statement of Purpose

Citizens Advice Birmingham wants to be part of a city where people can make choices and pursue opportunities informed by being able to access appropriate advice and information when they need it.

We aim to provide the advice people need for the problems they face and improve the policies and practices that affect people's lives.

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

In providing our services, we can make a significant contribution to the city's plans for levelling up, addressing child poverty, improving wellbeing and closing the gap between disadvantaged communities and the more affluent areas of Birmingham.

We will do all of this by effectively planning how we use our resources and ensuring that we are able to provide services which are accessible and meet the needs of as many people as possible.

We currently have about 50 FTE paid staff and 20+ regular volunteers, our current turnover is over £2 million.

Our 2024 – 2026 Business Development plan of necessity addresses the current delivery of services to those who need them. We also continue to seek to make the organisation and our services more sustainable, by securing new funding and continuing to consider how technology might improve access to advice for those who need it. All aspects of this plan are underpinned by our commitment to equity, diversity, and inclusion. Our strategic objectives are:

- 1.** Provide the people of Birmingham with high quality and accessible services. We will continue to develop our use of technology to help more people and to support them to help themselves. We will seek to provide a wider range of advice services and be more needs-led rather than funding-led in future.
- 2.** Have the financial resources to address the advice needs of the city in the most efficient way possible. We will continue to seek new funding streams including more corporate sponsorship as well as investigating entrepreneurial activity. We will strive to control our expenditure and will seek to achieve full cost recovery in any contracts we undertake.
- 3.** Develop and maintain an appropriately skilled and motivated workforce. We will continue to

develop a workforce of paid staff and volunteers which is diverse and reflects the communities of Birmingham. We will seek to retain the right people with the right skills in the right roles through talent management and succession planning. We will offer a range of volunteering opportunities which will enable people to acquire skills and move into paid work.

- 4.** Have the appropriate infrastructure to provide high quality services and ensure the efficient management of the organisation. We will continue to assess how best to deliver services to meet the needs of the community, particularly via telephone and digital approaches.
- 5.** Use data to analyse and research issues to campaign on for the benefit of clients and the wider community. In recognition that it is better to treat the cause than the symptoms, we will place research and campaign work at the heart of what we do, at every level of the service. We will seek to involve trustees more in our research and campaign activity. We will regularly contribute to national and local campaigns and to initiate local activity based on the use of local data and evidence.
- 6.** Establish Citizens Advice Birmingham as the market leader in the provision of high quality, accessible advice; and ensure that we are regarded as a reliable, influential charity to do business with. We will work towards being a more proactive force within the community by forging and maintaining links with key decision makers. We will raise awareness of the issues affecting the local community with those who have the power to bring about change. We will demonstrate how our work can assist in meeting local strategic plans and the positive impact it has upon the community.
- 7.** Promote equalities and challenge discrimination in all that Citizens Advice Birmingham does. We will ensure we address discrimination with clients whenever it arises. We will continue to ensure all our services are accessible to people with physical disabilities and/or mental health issues. We will provide equality related training opportunities including discrimination advice training for all trustees, staff and volunteers.
- 8.** Ensure excellent governance. We will continue to develop the diversity of the trustee board, to ensure it is reflective of the communities we serve. We will ensure trustees utilise feedback from staff, volunteers and other stakeholders to inform the annual board appraisal.

# Terms and Conditions

## 1. Salary

In the region of £66,000 depending on experience

## 2. Hours of Work 36.5

Working hours are between 8 am and 6 pm, Monday to Friday, but as chief executive you will need to be able to work the occasional weekend day and attend evening meetings.

## 3. Annual leave

Annual leave is 25 days plus 8 bank holidays pro rata per annum from 1st January to 31st December. This rises to 30 days pro rata over the next five years. After passing the probation period, employees can ask to buy up to five days additional leave (pro rata for part time employees).

## 4. Place of work

The successful candidate will be expected to act as a visible leader to staff and volunteers and develop strong relationships with current and prospective partners and funders. This will require significant presence in our Birmingham office and at other locations in Birmingham. However, we recognise the value of hybrid working and there will be some flexibility for hybrid working in the role.

## 5. Pension Scheme

Citizens Advice Birmingham encourages employees to save towards their retirement. As such we auto enrol employees into a pension scheme. Full details will be sent upon appointment.

## 6. Learning and Development

Employees are encouraged to develop and be active participants in identifying their development needs and sourcing training and development opportunities.

## 7. Salary Sacrifice Schemes

Citizens Advice Birmingham operates a system whereby you can 'buy' additional leave allowance of up to five days per annum (pro rata for part time employees).

## 8. DBS Checks

Citizens Advice Birmingham will require the successful candidate to undergo a basic DBS check. We do not accept previous checks.

## 9. Equality and Diversity

Citizens Advice Birmingham recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable.

Citizens Advice Birmingham will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, gender reassignment, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other equivalent factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

## 10. Dignity at Work

Citizens Advice Birmingham is committed to providing a culture in which all employees value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All employees are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

## 11. Probationary Period

New appointments are subject to a six months' probationary period. Performance is reviewed after three months and again after six months. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice Birmingham's discretion, an extension of the probationary period by a further three months. During this period you will not be entitled to occupational sick pay.

# How to apply

**The closing date is  
19/09/24 at 12 noon**

The interviews will be held in early October (please let us know of any dates around then you would be unable to attend for an interview).

Applications will be in the form of a CV and a covering letter telling us how you meet the person specification for this job (no more than 3 A4 pages for each of these). These should be sent to Patricia Adamson, [p.adamson@bcabs.org.uk](mailto:p.adamson@bcabs.org.uk)

The full job details are available from our website [www.bcabs.org.uk](http://www.bcabs.org.uk) or contact Patricia Adamson [p.adamson@bcabs.org.uk](mailto:p.adamson@bcabs.org.uk) for a pack.

If you wish to speak to someone in connection with this role, please contact Patricia and she will arrange for someone to call you back.



## Notes to applicants

### Entitlement to work in the UK

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that Citizens Advice Birmingham does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

### Diversity monitoring

Citizens Advice Birmingham values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this we need to know about the diversity profile of people who apply for posts. This information is given in confidence for monitoring purposes only and is not seen

by anyone responsible for making recruitment decisions. However, you may prefer not to answer any of the questions we ask.

### Shortlisting outcomes

Shortlisted applicants will be invited for an interview and may also be invited to deliver a presentation to trustees and staff. Further details will be provided if you are shortlisted.

We will endeavour to let all candidates know the outcome of their application, but if you have not been contacted by the end of October 2024, please assume on this occasion you have been unsuccessful.

### References

All job offers are subject to the receipt of two references that are satisfactory to us: one of these should be your present or most recent employer, the other could be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the post.

The logo for Citizens Advice Birmingham, featuring a white speech bubble on a blue background with the text 'citizens advice' inside.

**citizens  
advice**

**Birmingham**

# **Seeks a new Chief Executive**

**Salary:**

In the region of £66,000 depending on experience

**Hours:**

36.5 per week

# Are you a leader with the passion to improve lives in Birmingham?

Citizens Advice Birmingham is 85 years old this year and we're looking for a new chief executive to build on our successes and take us into the future.

Our successful candidate will be an inspiring, values-led leader with strong strategic and commercial skills, who will ensure the continuing growth and success of our charity. You will lead an award winning team of staff and volunteers who deliver outstanding advice services across Birmingham. You'll use your excellent communication skills to develop strategic connections with funders and partners, and make the case

for investment in advice services across Birmingham.

Over the past few years we have faced a pandemic, the cost of living crisis, and funding cuts, and we have responded with compassion, energy, and innovation. Our new chief executive will ensure that our charity remains well-governed, vigorous and resilient so that we can face future challenges with the same confidence that has seen us succeed over the past 85 years.

Full job details are available for download from our website [www.bcabs.org.uk](http://www.bcabs.org.uk) or contact Patricia Adamson, [p.adamson@bcabs.org.uk](mailto:p.adamson@bcabs.org.uk) for a pack.

Apply by sending a CV and covering letter (of no more than three pages each) to [p.adamson@bcabs.org.uk](mailto:p.adamson@bcabs.org.uk)

Closing date: midday on 19/9/24.





# Job Description

## Chief Executive

### Hours:

36.5 per week

### Responsible to:

The trustee board (line management will be through the Chair of the Board)

### Salary:

In the region of £66,000 depending on experience

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### Main Duties and Responsibilities

1. Develop and maintain mutually beneficial relationships with key stakeholders, partners and potential partner organisations.
  2. Ensure the financial sustainability of the Citizens Advice Birmingham ("the Service") by developing and implementing a long-term funding strategy, prudent budgeting and effective financial management.
  3. Secure the strategic development of the Service consistent with the long-term vision.
  4. Develop and secure the effective day to day management of the Service and delivery of agreed operational plans within agreed budgets, to deliver a high quality advice service to the residents of Birmingham.
  5. Work at all times in conjunction with the trustee board.
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#### 1. Develop and maintain mutually beneficial relationships with key stakeholders, partners and potential partner organisations:

- Engage proactively in the development of city and region wide services as they relate to advice strategies.
- Proactively engage with and where possible influence the strategy of key stakeholders, such as current and potential funders, for the benefit of the Service.
- Identify and liaise with key stakeholders, partners and potential partner organisations.
- Understand the needs and priorities of key stakeholders including awareness of changing political agendas and needs of key stakeholders, partners and potential partners.
- Secure the active support of key stakeholders, partners and potential partners for the vision, development and growth of the Service.

#### 2. Ensure the financial sustainability of the Service:

- Identify, develop and maximise new funding and commercial opportunities for the Service.
- Develop and implement a long term funding strategy, in conjunction with the trustee board, that diversifies and maximises the sources of funding for the Service and secures its financial sustainability in line with the agreed strategy.
- Ensure that the Service is sufficiently robust to respond to the opportunities and challenges of the changing economic climate.
- Ensure that:
  - » all financial and reporting obligations are met;
  - » annual budgets are developed for the trustee board which are effectively managed, monitored and achieved; and
  - » accounts and financial statements are prepared correctly in liaison with the trustee board and Auditors.

#### 3. Develop and progress a long-term vision for the growth and sustainability of the Service:

- Advise and assist the trustee board to develop a long-term vision for the growth and sustainability of the Service.
- Communicate and promote the vision both internally and externally, including liaison with the media.
- Prepare and present to the trustee board a business plan, an operational plan and a risk strategy and keep the Board updated in relation to the same.
- Identify development opportunities consistent with the aims of the Service.
- In developing and implementing the long-term vision, ensure that:
  - » the Service is an equal opportunities organisation;
  - » account is taken of demographic changes, the needs of disadvantaged groups and the needs in different geographical areas; and
  - » an awareness is maintained of the environment in which the Service operates, to include legislative developments, social trends and local needs

# Job Description Cont.

## 4. Develop and secure the effective day to day management of the Service

- Develop and lead a senior management team that will manage the day to day operations of the Service.
- Continue to review management practices and organisational structure to maintain a 'match fit' delivery organisation.
- Take overall responsibility for:
  - » the effective performance management of the senior management team;
  - » keeping the organisation structure of the Service under review and proposing changes as required for effective delivery of the long-term vision;
  - » translating the business and operational plans into team and individual work plans with clear and realistic targets;
  - » developing a quality service and maintaining high standards of delivery;
  - » staff recruitment, induction, support and management and the proper implementation of internal policies and procedures;
  - » ensuring positive staff and volunteer relations through regular information exchange and appropriate consultation with staff; and
  - » ensuring that health and safety policies and procedures for staff, premises and equipment are agreed and maintained and meet statutory requirements.

## 5. General Duties

- Work at all times in conjunction with the trustee board and report to the Board on progress against agreed objectives.
- As chief executive:
  - » ensure that all the requirements of charitable and company law are met; and
  - » arrange the Service's AGM and any Special General Meetings and prepare the Service's annual report.
- Ensure that the Service operates within the terms of its membership with National Citizens Advice and work in cooperation with National Citizens Advice by:
  - » participating in national strategies; and
  - » contributing to strategy at regional and national level.
- At all times promote the aims, principles, policies, interests and wellbeing of the Service and protect its integrity and reputation.
- Undertake such other tasks as may be reasonably required by the trustee board .

## CHIEF EXECUTIVE – Person Specification

### The ideal candidate will be able to:

- manage the Service in a challenging and dynamic economic climate;
- influence stakeholders, partners and potential partners for the benefit of the Service;
- manage a complex, multi-faceted organisation with a large number of paid staff and volunteers;
- build mutually beneficial relationships with representatives from a wide range of organisations;
- identify opportunities to develop the service, including through joint working and consideration of innovation and best practice examples;
- manage own workload and time effectively;
- lead and motivate a team;
- set, manage and work within budgets.

### The ideal candidate will also exhibit:

- an understanding of, commitment to and enthusiasm for, Citizens Advice and its objectives;
- an awareness and understanding of social welfare issues and policy;
- an understanding of and commitment to equal opportunity and diversity issues;
- an awareness of the demographics of Birmingham's communities, and demonstrate an understanding of the sensitivities of providing services to these diverse communities;
- an understanding of current political agendas and social policy and how these may affect the Service;
- a proven ability to develop and successfully implement a commercial and funding strategy;
- a track record of leadership in a complex, fast moving environment with a political dimension;
- a commitment to health and safety and good employment practice;
- excellent written and verbal communication skills; and
- a proven ability to be flexible and adaptable when required.

# Organogram

