



Chief Officer Job Pack

Thank you for your interest in working at Citizens Advice Woking. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our purpose
- 3 things you should know about us
- Overview of Citizens Advice Woking
- The role profile and personal specification
- Terms and conditions
- What we give our staff

The role of Chief Officer at Citizens Advice Woking is an important one for the charity and this is an important time to continue to provide much needed services to our local community, particularly the most vulnerable. We have a great team of staff and volunteers.

If you want to chat about the role further, you can contact the current Chief Officer, Lorraine Buchanan at lorraine.buchanan@wokingcab.org to arrange a call.



Our purpose

We exist to shape a society where people face far fewer problems. Our national charity and network of local charities are united by this common purpose.

We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our work with governments and other organisations.



3 things you should know about us

1. We're local and we're national. The national charity has 4 administrative offices in England and Wales supporting the work delivered by around 240 independent local Citizens Advice member charities.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

About Citizens Advice Woking

Citizens Advice Woking (CAW) is an independent local charity and a company limited by guarantee.

We provide free, confidential, impartial, and independent advice and information for the benefit of the local community, to exercise a responsible influence on the development of social policies and to ensure individuals do not suffer through lack of knowledge or an inability to express their needs effectively.

CAW provides face to face services in the following locations –

1. **Woking Town Centre** (Provincial House 26 Commercial Way Woking GU21 4PW) Drop-in Sessions – Tuesday – Thursday 10am – 1pm - Initial Assessment interviews

Appointments Monday – Friday 10am – 4pm Generalist Adviser Interviews

Follow up Generalist Adviser appointments, Specialist Caseworker appointments

2. **The Byfleet Methodist Church**, Rectory Lane, Byfleet.

Wednesday 12:00am- 2pm Drop in for initial assessment

Appointments by arrangement

3. **Ukrainian Hub**, Lighthouse Woking, 8-10 High St, Woking GU21 6BG

Tuesday Weekly 10:30am- 2:30pm Initial Assessments Only drop-ins

4. **The Mascot Hub** Dartmouth Avenue **Sheerwater** GU21 6PE

Thursday Weekly 10am – 1pm

Initial Assessments Only Drop ins

CAW provides a telephone service via Adviceline

Monday – Friday 10am – 4pm

Clients can contact CAW through its website at www.wokingcab.org

We also run the following Projects on behalf of different funders –

I Access Community Drug and Alcohol Service – funding from Surrey and Borders NHS Trust to provide a generalist adviser to advise on all enquiry areas.

United Byfleet Charity – funding to deliver an outreach session in the Wards furthest from the town centre office.

Trussell Trust Foodbank – Funding to provide a Generalist Adviser at Foodbank sessions to provide information and advice and to reduce reliance on the Foodbank.

Ukrainian Hub – Funding from Woking Borough Council to provide Generalist Advisers to give information and advice to the Ukrainian members of the Community

Refugee Support – Funding from Woking Borough Council to provide a welfare benefit adviser to support the Syrian and Refugee community and to provide generalist advice to the wider refugee community.

Hardship Project – Funding from Woking Borough Council to support those who have Council Tax arrears.

Healthwatch Surrey – funding from Healthwatch Surrey to provide insight and trends of those clients experiencing health and social care problems.

Governed by a Board of 8 trustees, we have a highly skilled workforce to support the organisation. This includes 13 paid staff (including a very capable Operational Manager) and more than 50 volunteers. We are currently recruiting for a new Chief Officer, upon the retirement at the end of March of our current CO, after being in post for 9 years.

Our generalist advice service is provided by volunteers who carry out reception and administrative duties, give information and advice and have research and campaign roles and are managed and supported by paid staff. We also have paid caseworkers in the areas of welfare benefits and housing.

Woking is often considered to be an affluent area with high levels of employment and rates of home ownership, however there are significant pockets of deprivation across the borough and our priority is to support the most vulnerable in our community. The main enquiry areas of welfare benefits, debt and housing continue to be the issues that most of our clients need help with.

The last 18 months has been a challenging period for CAW, summarised as:

- CAW's main funder, Woking Borough Council, issued a Section 114 Notice in July 2023 in response to the 'unprecedented financial challenges facing the authority'. This resulted in the ceasing of the Community Grants scheme, which was the source of CAW's unrestricted grant in 2023/24 (£189,000) and previous years
- We were able to put together a balanced budget for 2024/25, but this did mean having to cut costs, for instance reducing opening times for the drop-in service at its town centre office from 5 days to 3 mornings a week, and reducing the number of applications for charitable support on behalf of clients, instead focusing on advice to help their situation

Despite these challenges, we were able to help more clients than in the previous year. In 2023/24, CAW's income was £485,000, 6,845 clients were supported, and helped with a total income gain of more than £2.8 million. For every £1 invested in CAW's service, £5.58 was generated in savings to government and public services.

Subject to confirmation from funders, CAW anticipates being able to achieve a similar level of income in 2025/26, using some of our well managed reserves to help ensure a continued good level of service for clients. We are now in a position to look to rebuild, with a renewed emphasis on bringing in new projects and seeking new sources of unrestricted grant funding.

At the same time, the need for greater collaboration, partnerships and potential mergers has been recognised across the Surrey network of Local Citizens Advice offices (LCAs). CAW will continue to work closely with the Surrey LCAs, including exploring the potential benefits of mergers.



The role

Reporting to the Chair of the Trustee Board, the Chief Officer

- Is responsible to the Trustee Board for the management and leadership of Citizens Advice Woking
- Represents Citizens Advice Woking to funders, partners and stakeholders
- Ensures the delivery of a high quality, impartial and confidential service, utilising both paid staff and volunteers
- Is responsible for the continuing funding, planning and financial management of the service
- Represents the organisation in Woking and contributes to the overall provision of strategic advice services in the borough

In particular, the priorities for the Chief Officer in 2025/26 will be to

- Manage CAW's external relationships, with our funders and the Woking community generally, to ensure satisfaction with the delivery of current projects
- Build on the current income base, in terms of increased existing project budgets, new projects, and diversifying the income base

The role requires working closely with the Operational Manager, who will be responsible for staff, volunteers, and, generally, the internal CAW operation.

Role profile

Existing funder relationships

- Negotiate and review all Service Level Agreements (SLAs) in consultation with the governing body, ensuring that existing services are adequately funded
- Maintain appropriate relations with funders, fulfilling all reporting requirements and ensuring compliance with the terms of any SLAs

Income Development

- Develop and maintain an effective fundraising strategy, in conjunction with the Trustee Board and the Income Generation Committee
- Identify and develop new sources of funding, to help diversity CAW's funding base
- Respond to opportunities to bid for contracts, grants and projects that become available, either as CAW or in collaboration with other local Citizens Advice
- Maintain and develop networks with mutual charities, social enterprises, businesses and other organisations that CAW could work in partnership with to bid for funding

Planning and Development

- In conjunction with the Trustee Board, develop, implement and monitor a business and development plan
- Maintain an awareness of the operating environment such as those legislative developments, social trends and local needs likely to affect demand for advice and opportunities for service development
- Manage the development of the service to ensure that the strategic development of CAW, its management and its services to clients reflects and supports the Citizens Advice service's equity and diversity strategy

Staff management (in conjunction with the Operational Manager)

- Create a positive working environment in which equity and diversity are well-managed, dignity at work is upheld and staff can perform at their best
- Take part in the recruitment, selection, and onboarding of new staff
- Ensure the effective performance management and development of staff
- Ensure all employment policies and procedures are implemented and followed

Stakeholder engagement

- Promote and protect the aims, principles, policies, interests and reputation of the Citizens Advice service locally and nationally, and ensure that the organisation has a high profile at all times
- Develop and oversee appropriate publicity through effective relations with the media and other community organisations, and through public speaking
- Develop effective relations with appropriate authorities, agencies, organisations and individuals, at local and national levels, including councillors, MPs, and local and national statutory and non-statutory organisations
- Liaise with Citizens Advice and contribute to its work at regional and national levels where appropriate

Financial management

- Maintain day to day financial control of the service, in conjunction with the Treasurer and the Finance and Risk sub committee, within budget heads agreed by the Trustee Board
- Working with the Finance Officer, 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 on the proper allocation of resources
- Prepare and review detailed budgets for approval by the Trustee Board, in conjunction with the Treasurer and the Finance and Risk sub committee

- Ensure that all financial reporting obligations are met in relation to submissions for funding, grant aid, contracts and any other initiatives
- Authorise expenditure up to limits as agreed by the Trustee Board

Support the Trustee Board

- In conjunction with the Chair, arrange and attend meetings of the Trustee Board, including regular Board meetings, sub committee/task groups, and the Annual General Meeting
- Advise the governing body on financial, staffing and service delivery issues and on compliance with the Citizens Advice membership agreement and all relevant legislation
- Report to the Trustee Board body on progress against the business plan and agreed objectives
- Work with the Trustee Board to prepare, draft and finalise the organisation's Annual Report

Administration (in conjunction with the Operational Manager)

- Maintain and monitor complaints procedures, in accordance with Citizens Advice policy
- Ensure that the service has adequate premises and is equipped for the needs of clients, staff, and volunteers, and the effective operation of the service
- Act as Health & Safety Officer to ensure that health and safety policies and procedures for staff, premises and equipment are agreed and maintained, and comply with statutory requirements
- Use and management of ICT
- Undertake such other duties as may lie within the scope of this post to ensure the effective delivery and development of the service

Person specification

Essential
1. Understanding of the voluntary sector and, in particular, knowledge of the strategic and policy environment in which the advice sector operates
2. Proven ability to devise and implement strategic development and resource plans, particularly in the area of service development, staff development and the management of change
3. Demonstrable track record of successful income generation and diversification, through promoting services, fundraising, and other activities
4. Proven track record of devising funded projects, setting them up for delivery and delivering them against agreed targets.
5. Proven ability to lead, motivate and contribute to a team
6. Demonstrable track record of financial management and budgetary control
7. Effective communication and presentation skills in person and in writing, to include researching and interpreting complex information and produce clear verbal and written reports, both internally and externally
8. Proven ability to earn and maintain the trust of stakeholders
9. Track record in project management
Desirable
1. Understanding of, and commitment to, Citizens Advice aims, principles and policies
2. Broad understanding of the operation of local and national government, and the administration of public and legal services, including an understanding of commissioning
3. Good up to date understanding of equity and diversity, and its application to service delivery and the recruitment and management of staff and volunteers
4. Demonstrable ability in people management, particularly in the voluntary sector
5. Ability to create a positive working environment in which equity and diversity are well managed, and staff are empowered and motivated to do their best
6. Ability to communicate and work well with a governing body
7. Track record of managing ICT in a working environment, including using ICT packages, undertaking ICT business planning, management information systems and procedures, and managing supplier relationships



Terms of Appointment

Job Title:	Chief Officer
Location:	Citizens Advice Woking
Hours:	3/4/5 days per week – 37.5 hours FTE (for discussion)
Salary:	Circa £50,000 FTE per annum
Holiday:	25 days annual leave (FTE) plus public holidays
Contract term:	Permanent, subject to 6 months' probation period
Preferred start date:	Early/Mid-March (some flexibility dependent on candidate)

What we give our staff

- 7% Employer Pension Contribution
- Employee Assistance Programme
- A company that is committed to its employees, valuing their knowledge, creativity, and flexibility
- Ongoing personal training and development
- The chance to work with amazing people and a nationally recognised charity.

How to apply

To apply for the role of Chief Officer at CAW, please send us your CV and a maximum 2 page supporting statement. The supporting statement should demonstrate how you meet the criteria outlined in the person specification and outline why you are interested in becoming the CO of Citizens Advice Woking.

All applications must be sent to wokingca@gmail.com

Closing date for applications: Monday 17th February

Applications will be reviewed on receipt on a rolling basis and we reserve the right to close earlier if applications from sufficient suitably qualified candidates have been received.