



# CEO Information Pack

March 2025



## ✔ Our vision and mission

- **Vision:** A future where free advice is easily accessible to people in South Lincolnshire.
- **Mission:** CASL improves lives by providing free, confidential, impartial, independent advice and challenges injustice.

## ♥ Our principles

The Citizens Advice service provides **free, independent, confidential and impartial** advice. It values diversity, promotes equality and challenges discrimination.

# Introduction from the Chair of the Trustee Board

I am delighted that you want to find out about becoming our Chief Executive Officer. This pack will tell you about **Citizens Advice South Lincolnshire**, what the CEO does and how to take the next step.

We serve our community from offices in Grantham, Spalding and Stamford, and seven outreach centres. When you visit us, you will see the commitment and professionalism of our staff and volunteers.



I am privileged to be joined on the Board by a committed, experienced and skilled team of other trustees who share our vision. The Board operates with a clear understanding of the different roles of the executive staff and the trustees. The Board provides strategic leadership and support for the Chief Executive Officer and senior managers, while properly exercising its governance responsibilities.

We are now looking for an experienced manager to lead CASL in the next phase of its development, contributing to and implementing its strategy. We are particularly seeking experience of success in funding bids, service development and management.

If you have a passion to serve the community, we would very much like to hear from you. For an informal discussion, contact me via email at: [monica.stark@citizensadvicesouthlincs.org.uk](mailto:monica.stark@citizensadvicesouthlincs.org.uk)

## **Monica Stark**

Chair of the Trustee Board

Citizens Advice South Lincolnshire

# About CASL

Citizens Advice South Lincolnshire (CASL) is an independent registered charity. We serve over 225,000 people in South Holland and South Kesteven. South Lincolnshire is very rural, covering 1,700 square kilometres. Our offices are at Grantham, Spalding (the head office) and Stamford. We have outreach sites at Bourne, Deeping St James, Grantham Foodbank, Holbeach, Long Sutton, Market Deeping and Sutton Bridge. CASL is a member of national Citizens Advice, the leading UK advice brand. CASL is one of 250 individual charities operating under the Citizens Advice umbrella. The main areas where we help clients are debt, benefits, housing, relationship, employment and immigration problems. We offer information and advice to large numbers of clients to a high, accredited standard of quality and leadership. We influence policymakers with evidence from our research experience. We train our volunteers and staff to advise on a wide range of issues.

We help people through face-to-face advice, on the phone and by email. We campaign locally and nationally. We have around 40 staff, almost all part-time, and over 70 volunteers.

We supported over 14,000 clients to find a way forward last year with over £7 million financial gain for them.

Despite the challenging economic climate, CASL's finances are sound due to strong relationships with our funders. Three local councils provide our core funding: Lincolnshire County Council, South Holland District Council and South Kesteven District Council. Their support enables us to attract project funding for our outreach services and other projects.

CASL was founded in 2016, following the merger of the Citizens Advice charities for South Holland and South Kesteven. Steady growth and an emphasis on making CASL “a great place to work” sees the charity in a positive position, with a high performing team and low staff turnover.

## Our offices and outreach sites



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## CEO job description

### Planning and development

- Manage the development of the service to ensure that the strategic development of the organisation, its management and its services to clients reflects and supports the Citizens Advice service's equity and diversity strategy.
- 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.
- In conjunction with the Board of Trustees, develop, implement and monitor the business and development plan.

### Working with the Board of Trustees

- Work closely with the Chair of Trustees on the strategic development of the organisation and to monitor all aspects of the organisations' objectives against the agreed plan.

- To attend and contribute to the Board of Trustees meetings and all other stakeholder meetings.
- To attend and contribute to all sub-committee meetings which cover finance, people and external affairs. This entails advising the Board of financial, staffing and service delivery issues and on compliance with the Citizens Advice membership scheme and all other relevant legislation.
- To report to the Board of Trustees on progress against the business plan and agreed objectives.

### **Service delivery**

- Maintain an awareness of organisational and technological developments and ensure that the service operates in ways which make best possible use of the resources available.
- Ensure, delegating as appropriate, that each service location is adequately managed, staffed and resourced.

### **Resource acquisition**

- Develop the organisation's funding base by identifying potential funding opportunities consistent with the aims of the organisation and the operating environment, and applying for funding as agreed with the Chair of Trustees.
- Negotiate and review all grants and service agreements in consultation with the Board of Trustees, ensuring that existing services are adequately funded and appropriate grant applications are made and monitored.
- Maintain appropriate relations with funders, fulfilling all reporting requirements and ensuring compliance with contracts and grant requirements.

### **Financial management**

- Maintain day-to-day financial control of the service within the agreed budget.
- Prepare and review detailed budgets for approval by the Board in conjunction with the Treasurer and Finance sub-committee.
- Ensure that all financial reporting obligations are met in relation to submissions for funding, grant aid, contracts and other initiatives.
- Act as a cheque signatory and authorise expenditure up to limits agreed by the Board.
- Make regular reports to the Board on income, expenditure and any variations from budgets.

### **Staff management**

- Work closely with the Senior Management Team and Management Team to create a positive working environment in which equity and diversity are well-managed, dignity at work is upheld and staff can do their best.

- Regularly evaluate staff learning and development needs and ensure that learning and development needs are identified and met in accordance with Citizens Advice standards.
- In accordance with Citizens Advice and organisational procedures, assist the Board in implementing and monitoring employment policies and procedures.

### **Public relations and research and campaigns**

- Ensure the development of research and campaigns. 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.
- Develop and oversee appropriate publicity through effective relations with the media and other community organisations and through public speaking.

### **Administration**

- Monitor complaints procedures in accordance with Citizens Advice requirements.
- Use IT as required for the role.
- Ensure that the service is adequately accommodated and equipped in consideration of the needs of clients and staff and the effective operation of the service.

## **CEO Person Specification**



### **What do you need to have?**

**You will need to be able to demonstrate** the knowledge, skills and ability to:

- Devise and implement strategic development and resource plans
- Formulate proposals, justify them and express them concisely and persuasively in writing and verbally
- Lead, influence and develop staff and volunteers
- Multi-task, manage time, delegate and prioritise
- Manage projects, people and change
- Understand the voluntary sector and the operation of local government, including commissioning
- Manage IT and be confident in using basic IT systems. (Technical expertise is not required.)

## **You will have experience in:**

- Line management of other managers, preferably in a service environment
- Using influence successfully with external decision-makers
- Financial management, budgeting and budgetary control
- Successful income generation including successful bid writing
- Managing a varied team and resolving people problems.

## **Your education and qualifications will have given you:**

- Very good numeracy and good literacy
- Basic financial literacy, preferably with accredited training
- Formal management training, if you have limited management experience.

## **What's in it for you?**

### **In addition to a competitive salary, benefits and flexible working, you can:**

- Join the best-known, respected national advice charity
- Enjoy outstanding job satisfaction in a successful organisation, making a real difference in its local community
- Lead a team and build relationships with trustees, staff and volunteers
- Gain valuable governance and board experience
- Build on your leadership and strategy skills.

### **We will support you with a range of resources, including:**

- The Chair of the Trustee Board meets regularly with the CEO to offer support and guidance, and to act as a sounding board
- National Citizens Advice updates and procedures, IT services, training, specialists, consultants and a regional Relationship Manager
- Citizens Advice Lincolnshire, a consortium of other Citizens Advice charities exchanging experiences and sharing resources
- Subcommittees focused on external affairs, finance and people
- Specialist volunteer groups focused on activities such as Research & Campaigns and fundraising
- External IT support
- The Trustee Board and individual trustees, who bring specialist skills, including accounting, the law, HR, government relations, marketing, compliance and risk management, Citizens Advice management, charity management, as well as general management.

- Individual trustees may also be available to support the CEO in defined areas or projects where they have specific expertise.

## Valuing inclusion

Our staff and volunteers come from a range of backgrounds. We particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black, Asian and Minority Ethnic (BAME) communities.

## Contact details and next steps

**After reading the role description**, if you can bring the necessary skills, knowledge and passion, have the experience we seek and will enjoy the opportunity of supporting the communities we serve, then we would love to hear from you.

**For further information and an informal discussion**, you are welcome to contact our Chair, Monica Stark, at [monica.stark@citizensadvice.org.uk](mailto:monica.stark@citizensadvice.org.uk)

### **To apply, please complete:**

- the **Application Form**, including the **Diversity Monitoring Form**
- and add **your CV**.

then send them to [humanresources@citizensadvicesouthlincs.org.uk](mailto:humanresources@citizensadvicesouthlincs.org.uk)

**The closing date for applications is 3 April 2025**