



Elmbridge (West)

Interim Chief Executive Job Pack

The role of Interim Chief Officer at Citizens Advice Elmbridge (West) (CAEW) is a pivotal one for the charity and this is an important time to ensure our sustainability and to continue to provide much needed services to our local community, particularly the most vulnerable. We have a great experienced team of staff and volunteers.

Governed by a Board of 7 trustees, CAEW has a highly skilled workforce to support the organisation. This includes 14 paid staff and 35 volunteers. We are currently recruiting for this position on the retirement of our current CEO.

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 us

CAEW 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.

CAEW provides **face to face** services in the following locations: -

Our main office - The Community Hub, 72 High Street Walton on Thames Surrey KT12 1BU

Outreach services at venues and community groups across the borough on a flexible basis.

Fort House Surgery

Weybridge Library

3 Foodbanks across Walton on Thames

Clients can also contact us free of charge via:

- Telephone through our **Surrey Adviceline** service.
- **Email**, either directly or via the national website.
- Our **website** – www.caew.org.uk

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

We maintain high standards in our quality of advice and are proud of our ability to react quickly to local needs and provide comprehensive support to clients.

We are obligated to meet the necessary inspection audits by our National Office, to ensure we meet the Advice Quality Standards accreditation requirements

The last year has been a challenging period for all CA offices with the upcoming change to local government reorganisation leading to uncertainty around funding and long-term sustainability. Fortunately, Chief Executive Officers from local Citizens Advice (LCAs) across Surrey meet regularly, as do our Chairs to ensure we are aligned strategically, and are ahead of the curve in planning for the future, with support from National Citizens Advice.

Work is ongoing to bring our organisations together in collaboration to mirror the new government unitary areas, including exploring the potential benefits of working together, and a key element of this role will be leading the organisation through this, managing change and supporting staff and volunteers to ensure continuation of service.

The role

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

- Is responsible to the Trustee Board for the management and leadership of CAEW.
- Represents CAEW 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 Elmbridge and contributes to the overall provision of strategic advice services in the borough.
- Manages the leadership self-assessment process to ensure we meet the accreditation requirements

In particular, the priorities for the Chief Executive in 2026 will be to

- Manage CAEW's external relationships, with our funders and the Elmbridge West 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.
- Explore opportunities to potentially integrate services with other local Citizens Advice in Surrey to ensure long-term sustainability and strengthen our impact, in line with the new Unitary Authority structure.
- Communication: Working closely with all staff & volunteers, who are responsible for service delivery.

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 and partners, 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.
- Identify and develop new sources of funding, to help diversify CAEW funding base, including writing funding applications.
- Respond to opportunities and bid for contracts, grants and projects that become available, either as CAEW or in collaboration with other local Citizens Advice.
- Maintain and develop networks with mutual charities, social enterprises, businesses and other organisations that CAEW could work in partnership with the aim 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 CAEW, its management and its services to clients reflects and supports the Citizens Advice service's equity and diversity strategy.

Staff Management

- Create a positive working environment in which 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 always has a positive profile.
- 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, Finance Team and the finance subcommittee, within budget heads agreed by the Trustee Board.
- Manage the organisation's budget, ensuring financial stability and responsible resource allocation in preparation for collaboration of LCA services in East Surrey.
- Work with the Finance Manager to ensure that all finances are properly administered and monitored, and that appropriate financial regulations and controls are always in place and in use.
- Advise on the proper allocation of resources.
- Review detailed budgets for approval by the Trustee Board, in conjunction with the Treasurer, Finance Manager and the 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, subcommittee/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

- Maintain and monitor complaints procedures, in accordance with Citizens Advice policy. Implement remedial action
- 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.
- Undertake such other duties as may lie within the scope of this post to ensure the effective delivery and development of the service

Skills & Knowledge required

Essential
1. Understanding of the Charity & voluntary sector and knowledge of the strategic and policy environment in which Citizens Advice operates.
2. Able to translate vision into measurable plans
3. Proven and demonstrable track record of successful income generation & fundraising
4. Proven track record of initiating new funded projects, setting them up for delivery and 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 to include researching and interpreting complex information and producing clear verbal and written reports,

8. Proven ability to develop relationships with stakeholders.

9. Proven track record in project & change management

10 Resilient & Adaptable

11 Excellent Communication Skills

12 Understanding of, and commitment to, Citizens Advice aims, principles and policies.

Desirable

Broad understanding of the operation of local and national government, and the administration of public and legal services, including an understanding of commissioning.

Track record of managing ICT in a working environment, including ICT business planning, managing information and supplier relations.



Terms of Appointment

Job Title:	Interim Chief Executive
Location:	Walton on Thames, Surrey
Hours:	28 hours per week
Salary:	£55,000 FTE- Pro rata for 28 hours a week
Holiday:	20 days plus bank holidays

Contract term:	12 months
Preferred start date:	1st July - negotiable

Staff Benefits

- 6% Employer Pension Contribution
- Employee Assistance Scheme
- 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 this role, **please send your CV and a maximum 2 page supporting statement to Terence Gale, Chair of Trustees – galet@caew.org.uk**

The supporting statement should demonstrate how you meet the criteria outlined in the person specification and outline why you are interested in becoming the Interim CEO of Citizens Advice Elmbridge West

The successful candidate will be subject to satisfactory references.

Closing date for applications: 6th April 2026