

Chartered  
Institute of  
Taxation  
Excellence in Taxation



## **APPOINTMENT OF CHIEF EXECUTIVE**

**APPOINTMENT BRIEF**

**FEBRUARY 2019**

# 01 AN INTRODUCTION

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The CIOT is the leading body in the UK for taxation professionals dealing with all aspects of taxation. Our primary purpose is to promote education in taxation. Our public comments and recommendations on tax issues are made solely in order to achieve this aim; we are an entirely apolitical organisation.

Membership of the CIOT is by examination, nationally recognised as the gold standard of UK taxation education, and the award of Fellowship by Council. We support our 18,700 members and 4,000 students throughout their tax careers, providing assistance through our London-based head office and network of 40 branches across the UK and worldwide.

One of our key aims is to achieve a more efficient and less complex tax system for all.

## Our vision

The Chartered Institute of Taxation's vision is to remain the leading institute for taxation professionals in the United Kingdom, serving the public interest through the pursuit of excellence and integrity.

## Our mission

Our mission is the advancement of public education in taxation.

### Delivering public benefit:

As an educational charity, public benefit is at the heart of the Institute's strategy and is integral to all our activities.

We deliver this by:

- Maintaining an educational and ethical framework of the highest standard aiming to produce tax advisers of the best quality for the general public (Chartered Tax Advisers)
- Working for greater public understanding of tax matters, including:
  - Promoting tax discussion and debate
  - Publishing and distributing information on tax matters
- Setting ongoing educational and ethical practice requirements for tax advisers and reviewing compliance with those requirements
- Supervising members for compliance with anti-money laundering regulations
- Actively engaging with legislators, regulators and administrators of tax law and others, and producing high quality representations and responses
- Providing, through our Low Incomes Tax Reform Group, a voice for vulnerable taxpayers and others unable to afford tax advice.

### Our objectives for the tax system:

The CIOT works for a better, more efficient tax system for all affected by it – taxpayers, their advisers and the authorities.

Our objectives for the tax system include:

- Greater simplicity and clarity, so people can understand how much tax they should be paying and why;
- Greater certainty, so business and individuals can plan ahead with confidence;

- A legislative process which translates policy intentions into statute accurately and effectively, without unintended consequences;
- A fair balance between the powers of tax collectors and the rights of taxpayers (both represented and unrepresented); and
- Responsive and competent tax administration, with a minimum of bureaucracy.

The CIOT is a registered charity in England and Wales, number 1037771 and a regulatory body for the purposes of anti-money laundering supervision of tax practitioners.

You can find out more in our 2017 Annual Report available [here](#).

Or visit our website <https://www.tax.org.uk/about-us>.

## 02 THE ROLE

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### Purpose of the Role

The Chief Executive is the leader of the business of CIOT. The Institute also has a President, which is an honorary post for one year; The President can be described as the “Leader of the Profession”.

As the highest ranked Officer employed by the CIOT, the purpose of the Chief Executive (CE) is to work with the Council on the design of CIOT’s strategy, especially bringing their own ideas and experience to such design, and to execute that strategy on behalf of the Council, under its delegated authority. This requires leading both paid employees and volunteers to achieve the goals set by the strategy. In addition, the purpose of the role is to act as the senior officer accountable to the CIOT Council and the Charity Commission and other interested parties for the highest standards of probity in the management of the Institute’s charitable funds and compliance with other legal and regulatory obligations.

The CE is responsible for ensuring CIOT resources are allocated to its activities and support functions such that its objectives are achieved without incurring undue risk; and advising the Council when its ambitions and resource availabilities are not matched.

The Chief Executive leads the staff body and contributes to the collective leadership of the CIOT working collegiately with trustees, Honorary Officers, Officers and others.

The Chief Executive should thus be capable of inspiring and managing a team of tax and educational professionals and support staff working in an educational and charitable organisation, where a commitment to the public benefit is needed.

The CE must also be able to adapt to the relationship challenges arising from annual changes in the overall management team due to the Presidential cycle; the Chief Executive’s focus must be on ensuring the long-term goals and health of the organisation, whilst the President is likely to be more focused on the “tax issues of the day”.

The Chief Executive must ensure that plans are made and executed to achieve the CIOT’s objectives, adapting to changes in the wider tax environment likely to affect the longer term, but not thrown off course by immediate controversies.

## Key accountabilities

All paid staff of the CIOT or paid contractors report ultimately to the CE unless otherwise specified in their job description.

With the exception of the CIOT CE, all staff are jointly employed by the CIOT and the ATT (Association of Taxation Technicians). Accordingly, the CE may be called to account by the Council of the ATT or its Honorary Officers. The CE must work cooperatively with the senior paid officer of the ATT, currently the Executive Director.

## Job impact

Successful development and delivery of Council's strategy in the furtherance of the Institute's charitable objectives is the primary objective of the CE role.

Measures of success would include growth in students and high retention of members, growth in revenue streams from existing and new sources, including qualifications, licensing of CIOT "intellectual property" and events, the esteem in which the Institute is held by relevant external stakeholders, the support given to members especially in their professional lives and the organisational and financial strength of the organisation.

The international development of the Institute is of increasing importance, and the CE has a key role in driving increased revenue from international sources, and increasing the CIOT's influence outside the UK.

# 03 PERSON SPECIFICATION

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The successful candidate will be an outstanding leader who will bring:

- strategic and inspirational people leadership experience in a complex organisation of equivalent scale;
- experience of successful commercial leadership;
- evidence of building excellent relationships across a wide and varied group of stakeholders, acting as an ambassador both internally and externally;
- experience and knowledge of developing innovative new products and services and ensuring value for money is achieved;
- first-class intellectual skills and judgement; and
- outstanding communication and influencing skills.

## 04 TERMS OF APPOINTMENT

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### Remuneration

This is a senior role and salary will be commensurate with experience.

### Location

This role is based at 30 Monck Street London, with substantial UK travel, and some international travel required.

### Right to work

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

### Pension

You will be automatically enrolled into the Aviva Group Pension Plan (9% employer and 3% employee contribution) upon joining.

### Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks;
- 24 hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/loss of a limb/death; and
- non-contributory life assurance cover of 4 times your salary.

### Holiday entitlement

The organisation offers a generous holiday entitlement offering staff holiday entitlement from 22 – 27 days depending on length of service. Staff also get a discretionary extra day holiday during Christmas.

### Optional Benefits

#### ***Bupa (private medical insurance)***

You can join our company paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

#### ***Healthshield Essentials (including Employee Assistance Programme)***

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy etc) and an employee helpline covering medical and legal issues and counselling.

### Interest Free Loans

After 6 months service you may apply for an interest free loan to help with the purchase of a season ticket or a bicycle.

### Child Care Vouchers

Our salary sacrifice child care voucher scheme is currently run by Kiddivouchers.

### Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.

# HOW TO APPLY

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Saxton Bampfylde Ltd is acting as an employment agency advisor to the Chartered Institute of Taxation on this appointment.

Candidates should apply for this role through our website at [www.saxbam.com/appointments](http://www.saxbam.com/appointments) using code **QAEALA**.

Click on the '**apply**' button and follow the instructions to upload a CV and cover letter, and complete the online equal opportunities monitoring\* form.

The closing date for applications is noon on **Wednesday 20 March 2019**.

*\* The equal opportunities monitoring online form will not be shared with anyone involved in assessing your application. Please complete as part of the application process.*

## **GDPR personal data notice**

According to GDPR guidelines, we are only able to process your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, health, sex life, or sexual orientation) with your express consent. You will be asked to complete a consent form when you apply and please **do not** include any Sensitive Personal Data within your CV (although this can be included in your covering letter if you wish to do so), remembering also not to include contact details for referees without their prior agreement.