

**JRF** JOSEPH  
ROWNTREE  
FOUNDATION

**JRHT** JOSEPH  
ROWNTREE  
HOUSING TRUST

# Appointment of Group Chief Executive July 2019



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“Through research, policy, collaboration and practical solutions, we aim to inspire action and change that will create a prosperous UK without poverty.”



# LETTER FROM OUR CHAIR

We are currently looking for a new Group Chief Executive to lead and develop the work of our combined organisations, the Joseph Rowntree Foundation and the Joseph Rowntree Housing Trust, at a time of major challenge and change.

With a staff of 760 across the group, based largely in and around York, we have been given a distinct and vital mission, backed by the generous endowment of Joseph Rowntree, to seek out the root causes of poverty, and to find practical ways to address these, working with those who are experiencing poverty and exclusion. Over the last couple of years, working with Campbell Robb, the Trustees and senior executive team have begun significant strategic developments for social change and for housing.

We have large teams working on the practical challenges of providing high quality care and affordable housing in York and Hartlepool, and they are very much grounded in the realities of delivering quality services at a time of tough economic conditions. Getting it right for our tenants and residents is central to our work, building and developing strong and empowered communities without poverty or isolation.

In parallel, our teams of policy experts, analysts, economists and communication specialists work across the UK to analyse the causes of poverty, whether in our social security systems, the labour market, or housing policies. We also build the political and public will to understand poverty and want to take action, working with partners to identify solutions. We passionately believe it is possible to solve UK poverty, changing the life chances of millions. In this, we work in partnership with many other organisations and groups, raising awareness, providing an independent and informed voice, seeking to build coalitions for reform.

All our work is enabled by a strong and effective central team. We have embarked on significant organisational changes which are also vital elements of the Group's success. These include improving our governance, implementing an ambitious people strategy and delivering a technology transformation, as well as changing our culture through a focus on values and outcomes so that we can deliver exceptional services, achieve our outcomes and see our vision realised.

We are looking therefore for a leader who shares our passion for real and lasting social change, and is keen to lead, motivate and inspire a large and talented multidisciplinary staff. As a leader of our strong leadership team, we are looking for an individual who will enable the highest levels of performance, champion equality and diversity, help us use our significant endowment to best effect, and further develop the wider partnerships we are nurturing to make significant change in tackling poverty across the four devolved administrations of the UK while at the same time ensuring through JRHT, we deliver exceptional social housing and care.

If you have the experience and skills and share our enthusiasm for tackling major social issues - both policy and the practical delivery of top-quality care and housing - please do read further and talk to our search partners. We would be very keen to hear from you.

Will Haire

Chair of Trustees

# INTRODUCTION

In 1904 our founder, Joseph Rowntree, the Quaker businessman, endowed our trusts with a very large part of his wealth. He was a successful chocolatier, building his business, Rowntrees, from small beginnings to become the major firm at the heart of York, along with his family. A philanthropist, he built a model village in New Earswick to provide quality housing for the local community, each home had a fruit tree and he provided medical care to his workforce. He closely studied poverty in York, and along with his son, Seebohm, sought to identify and solve the cause of poverty. In leaving us an endowment, he emphasised that he wanted his funds to be used to “search out the underlying causes of weakness and evil” in order to lead to fundamental remedies, not merely to treat the symptoms of social problems.

Since then there have been many areas of progress, many of them influenced by Joseph and his family's work, but we know that poverty is still the most pressing social issue facing us today. We are committed to working together for a prosperous UK without poverty, where everyone is able to thrive and contribute. And, like Joseph, we want to work with those experiencing poverty, and with everyone who shares our concerns, to find practical solutions. We will always be driven by the vision of our founder and are constantly working out what this means now for our work in the present day.

Our structures have developed over the years to meet new challenges. We are currently structured in two organisations - the Joseph Rowntree Foundation and Joseph Rowntree Housing Trust. These are two individual charities that share the same vision, have closely tied governance and common central services, and enjoy significant mutual benefit through partnership and shared





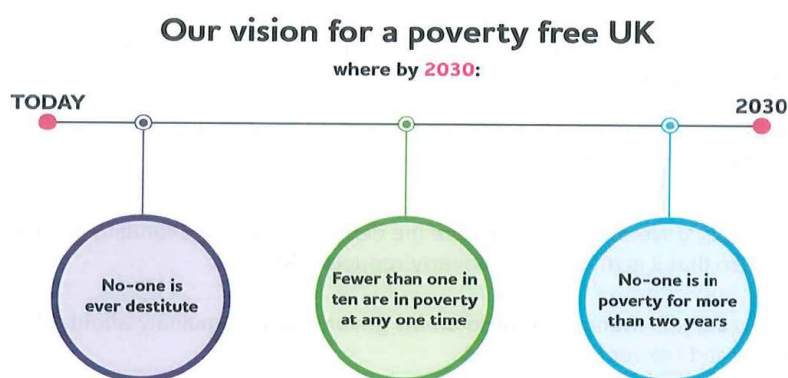
learning. Both are undergoing the process of incorporation, to be completed by the end of this year, which will make our governance structure more up to date and effective. They will however operate under a group structure, ensuring that we fulfil our founder's practical but radical vision.

## Joseph Rowntree Foundation (JRF)

JRF is an independent social change organisation working to solve UK poverty. It is based in York, with offices in London and Glasgow and partners in Cardiff and Belfast, as well as in other parts of the UK. Awarded the prestigious Social Policy Think Tank of the Year in both 2017 and 2018, JRF has a long tradition of working on social policy but is now strongly focused on solving poverty in the UK, by developing new approaches as well as influencing change in existing policies, to achieve our outcomes:

- more people want to solve poverty, understand it and take action
- more people find a route out of poverty through work
- more people find a route out of poverty through a better system of social security
- more people live in a decent, affordable home

We seek to measure our success through our impact, with our overall measure of success as set out in our strategy “we can solve UK poverty”



## Joseph Rowntree Housing Trust (JRHT)

Today JRHT employs around 610 staff and manages 2,500 homes. Our housing stock began in New Earswick which was the original Garden Village developed by Joseph Rowntree, aimed to be a genuinely mixed community, self-governing and driven by civic spirit. The rest are spread across North East England, including York, Scarborough, Leeds and Hartlepool. We cater for a wide variety of needs. We have flats, houses and bungalows suitable for single people, couples, families with children and older people. This includes sheltered and retirement living schemes with extra care services, residential and nursing care services, as well as providing independent living services to adults with learning disabilities. We are a registered social landlord and registered care provider. We invest in and support communities to enhance the lives of those living in them.

Both JRF and JRHT are supported by a central team of staff working in areas such as finance, HR, health and safety, technology and change, internal communications, project management and business change.

## **Some recent developments**

- Putting poverty onto mainstream political and economic agendas – establishing a clear focus on what is happening for people and places in poverty and developing solutions to tackle its root causes
- Derwenthorpe, a new mixed income community in York of environmentally friendly housing, built in partnership with David Wilson Homes, which has won numerous awards for sustainability and design
- The focus on outcomes as the key driver for our work and recent successes in framing the way we talk about poverty through, for example, our support in the production of ground-breaking documentary film A Northern Soul
- The development of New Earswick which includes the recent refurbishment of the Folk Hall and the building of New Lodge, a development of 151 residential care and extra care suites, as part of our vision to develop a community for all ages

## **Our Work in York**

We are acutely conscious, of the wider social housing need of York, and Trustees have set aside resources so that in the coming decade we can provide an additional 1000 homes to the area and work with other partners to have a major impact on the housing needs of the city.

The York base of the majority of our staff and of the majority of our housing stock is important to us and as a leader in the City, our Group Chief Executive needs to balance the wider national priorities, particularly of JRF, with the important role we must play in the Yorkshire community.

## **Our focus and values**

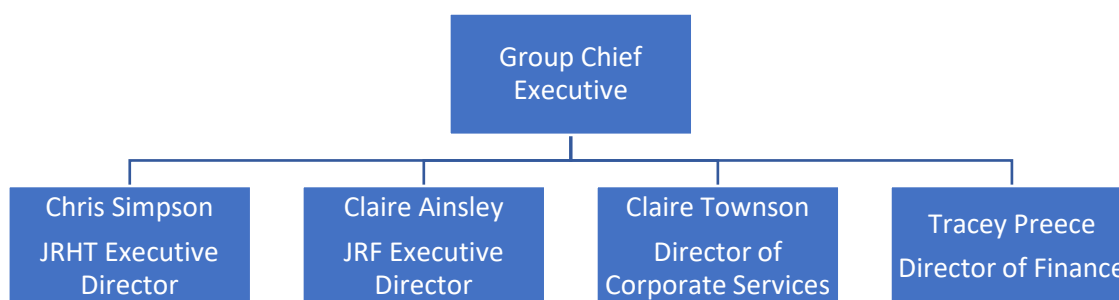
JRF and JRHT have a clear vision defined in an ambitious strategic plan published in 2018. All parts of the organisation are embracing transformational and cultural change in their operating models and modernising their ways of working. Our outcomes, values and value for money framework are embedded throughout, and in the coming years there needs to be a continuing focus on this work.



- We're built on trust – the foundations of all our relationships are grounded in trust and integrity. We create this trust by making decisions that are based on evidence
- We show we care – care comes from a sense of mutual respect, inclusivity and a big-hearted approach to meeting the needs of our colleagues, residents and partners
- We make a difference – we use our time and resources effectively and as individuals we challenge ourselves to create the best outcomes, from briefing an MP to effecting a change in policy, to a picture that makes a resident smile

## Our Structure

The Group Chief Executive is the most senior member of the Executive, and reports directly to the Board of Trustees. The executive comprises the Group CE and directors as shown in the chart below.



By the end of 2019, both JRF and JRHT will have been incorporated as separate charities with their own Boards with a trustee composition that will ensure robust but co-ordinated governance.

JRF and JRHT have a shared vision and each makes a distinct contribution to that through their separate missions and outcomes, ensuring that JRHT is in a strong financial position for the future and that the JRF has successfully transformed itself into a modern social change organisation.

The Parent Board is chaired by Will Haire.

## Finances

The endowment, valued as the investment portfolio less outstanding liabilities, stood at £386 million as the end of financial year 2018. A specialist committee provides dedicated and professional support to oversee the investments. The majority are held as financial investments, with up to 5% of the fund allocated to social investments.

The full Annual Report and financial review of JRF for 2018 can be found here:

<https://www.jrf.org.uk/legal/annual-report-and-accounts>

JRHT has a turnover of c£26m and has been going through a significant improvement programme, focusing on a range of measures to support all areas of our work. In 2018, £50 million of the investment portfolio of JRF was also ring fenced to help fund the future development of new affordable housing.

The full Annual Report and financial review of JRHT for 2018 can be found here:

[https://www.jrht.org.uk/sites/default/files/jrht/files\\_-\\_general/jrht\\_tar\\_and\\_accounts\\_ye\\_31dec18\\_signed.pdf](https://www.jrht.org.uk/sites/default/files/jrht/files_-_general/jrht_tar_and_accounts_ye_31dec18_signed.pdf)

## Strategy

Our current strategic plan runs through to the end of 2021 and can be found here:

<https://www.jrf.org.uk/about-us>

With Campbell Robb, the Trustees set in place a major change process to ensuring that we drive forward Joseph Rowntree's radical vision in the current context. We are seeking a new Group Chief Executive to lead, motivate and unite the organisations as a group to achieve the inspiring vision for a prosperous UK without poverty, as well as to become an outstanding housing and care provider, strengthening the communities in which we operate. The opportunities to harness the depth and breadth of change happening are significant and we are seeking a Group Chief Executive keen to embrace the developments underway and build on these, leveraging the potential of both JRF and JRHT to have considerable impact at both the national and local level.

The role description and person specification are shared below.







# THE ROLE

## Job Purpose

The new Group Chief Executive needs to demonstrate the capability and experience of leading and managing a large, multi-disciplinary organisation. The 760 staff range across many roles including care assistants, housing managers, tradespeople, economists, policy experts and communicators. The appointee will have the intellectual agility to operate across a broad spectrum of activity and move between the diverse demands of the role; demonstrating both thought leadership and practical management and leadership skills. They need to be able to lead, motivate and inspire a large and talented staff team through the Executive team, building an organisation that delivers the highest levels of performance and reflects the diversity of those we represent. The Group Chief Executive will be accountable to the Trustees for the proper use of the endowment – currently £400million – and for a housing stock of around 2,500 units. They need to be comfortable with a high profile nationally and locally, and in dealing with opinion formers at all levels, able to develop effective partnership with a wide range of bodies to effect the social change we are seeking while also playing an important civic leadership role in York.

The Group Chief executive will lead, motivate and unite JRF and JRHT behind the inspiring vision for a prosperous UK without poverty. They will embrace the transformational change already underway and be accountable for the delivery of the strategic plan against agreed outcomes, measures and values. The Group CE will play a central part in the national debate and will forge effective strategic partnerships, networks and alliances at appropriate levels and places.

This complex set of responsibilities is shaped within three-year plans, and JRF and JRHT are not yet halfway through the current strategic plan (2018-2021) with an ambitious programme of change happening. The new Group Chief Executive will have the chance to seize the opportunities through this work to create lasting impact on poverty in the UK.

The external environment for both care and social housing remains challenging. Despite this we will need to continue to build and develop strong empowered communities without poverty or isolation.

We consider our reputation to be one of our greatest assets at a time where the funding and priorities of charities are under enhanced scrutiny. Because of our keenly-defended political independence, JRF/JRHT successfully works with policy makers and politicians across the political spectrum, and across the four devolved administrations of the UK. The new Group Chief Executive will have the responsibility to protect this reputation and independence, and to develop the profile and impact of the two organisations as appropriate within a changing policy environment.

### Main Responsibilities

The Group Chief Executive is the most senior post in the organisation and has personal responsibility for:

- Strategic direction and stewardship: realise the vision and missions of JRF and JRHT through the delivery of the strategic plan, act as a champion and advocate of our work at the highest levels with multiple stakeholders across the UK and have oversight of investment strategy so that the endowment is used effectively and imaginatively to achieve our outcomes
- Organisational leadership: The Group Chief Executive will be a leader of our leadership team, enabling them and our considerable staff to achieve our outcomes; underpinned by our values and effective deployment of our resources with value for money at the core. They will ensure the highest levels of performance, be accountable for the well-being and development of staff; a champion of equality, diversity and inclusion
- Corporate governance: the most senior member of the executive with accountability for ensuring that trustees are enabled to carry out their role, that all legal and regulatory responsibilities are discharged, and that the governance of the organisations meets the highest possible standards
- Representation and advocacy: engage, convene and influence multiple stakeholders and groups across many sectors, building strong partnerships, generating and applying evidence to enhance JRF and JRHT's ability to inspire social change. Further develop our approach to partnership working that advances our work and impact, convenes diverse stakeholders and enables the organisation to act as a catalyst for social change
- JRF and JRHT activities: ultimately responsible for the delivery of services we provide in our communities and deployment of funding to achieve our social change outcomes as well as the corporate services which enable these. This includes considerable social housing and property stock and a number of care establishments





# PERSON SPECIFICATION

Specifically, you will have the following skills and experience:

- A record of achievement as a senior leader in a complex and diverse organisation;
- An inspirational leader with the ability to motivate and drive an organisation of scale to deliver outcomes;
- Experience in leading organisational transformational change including maximising the opportunities of digital;
- Proven ability to build successful partnerships, networks and alliances; a talented relationship manager;
- Demonstrable ambassadorial skills including the ability to use a wide register of advocacy skills to make the case both internally and externally.;
- A highly skilled influencer; comfortable engaging with and deploying the evidence gathered by JRF/JRHT to inform and influence public policy and practice;
- A well-developed understanding of the social and political landscape;
- Some knowledge of social housing sector and care sector in terms of regulatory framework, funding and current operating environment;



You will also demonstrate the following personal attributes:

- A collaborative and inclusive leadership style, with the ability to motivate and drive an organisation of scale to deliver outcomes; a commitment to the development of colleagues
- Courage, imagination and confidence to make bold decisions, grasp opportunities and embrace change.
- A visionary thinker, strategic in outlook and pragmatic in approach;
- Ambitious with a sense of urgency and passion;
- Ability to build strong relationships with people across all walks of life;
- A passion for social justice and a strong belief in the value of diversity as a foundation for strong and effective organisations, communities and for society
- The personal authority and credibility to inspire and command wide respect and confidence, both internally and externally
- The intellectual agility to operate across a broad spectrum of activity and move between the diverse demands of the role demonstrating both thought leadership and pragmatism; to be at once analytical and creative
- Independent minded, unprejudiced with impeccable integrity and good judgement
- A strong duty of care to all our residents, beneficiaries, staff and stakeholders





# TERMS OF APPOINTMENT

<b>Location:</b>	The post is based in York, at JRF and JRHT's headquarters at the Homestead. The Group Chief Executive is required to travel extensively within the UK. The role demands a significant presence in York, both to provide visible leadership across the organisation and to represent the JRF and JRHT within the local community.
<b>Salary:</b>	Competitive
<b>Expected Start Date:</b>	Late 2019
<b>Political Affiliation:</b>	The Joseph Rowntree Foundation is not aligned to any political party. The Group Chief Executive will influence across the political spectrum and will have the responsibility to protect the independence and reputation of JRF. Candidates who are currently active in party politics, and particularly those who hold or have recently held party political office, may be disqualified under JRF's codes of employment.

## HOW TO APPLY

Saxton Bampfylde Ltd is acting as an employment agency advisor to the **Joseph Rowntree Foundation** on this appointment.

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

Click on the 'apply' button and follow the instructions to upload a CV and cover letter.

The closing date for applications is noon on the 19th of August **2019**.

### 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.

*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.*



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