



**Independent
Age**



Appointing
a CEO

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Introduction from our chair



Dear candidate

We believe that no one should face financial hardship in later life, and we are committed to improving the lives of older people who are struggling. Our strategic ambition is that by 2027 we will have improved the lives of one million older people.

We believe there has never been a greater need for Independent Age's work. More than two million older people are already in poverty and another three million with precarious finances are on the brink. As these numbers swell, we must act to prevent and alleviate such suffering. Given our history, experience and resources, we are uniquely positioned to address this challenge.

I hope that you are as concerned as I am about the growing blight of poverty in later life, and energised by the opportunities that exist for a charity like Independent Age to make a difference to the lives of older people who are most in need of support.

We are seeking a new chief executive officer with the experience and energy to create the momentum we need to drive us forward through our next phase of growth and development. We are looking for an ambitious visionary leader who will bring a real passion for our cause and who will be highly motivated by the opportunity to help Independent Age maximise its impact.

We hope that with your strong strategic and operational leadership skills, alongside your ambassadorial approach to partnership-building and communicating effectively with external stakeholders, we can make an even more meaningful difference in the lives of older people in financial hardship.

We would be grateful to have you consider joining our inspiring and dedicated team.

We look forward to hearing from you.

A handwritten signature in white ink, reading "Julia Neuberger". The signature is fluid and cursive, with a large initial 'J' and 'N'.

Baroness Julia Neuberger, DBE
Chair of Trustees

About Independent Age

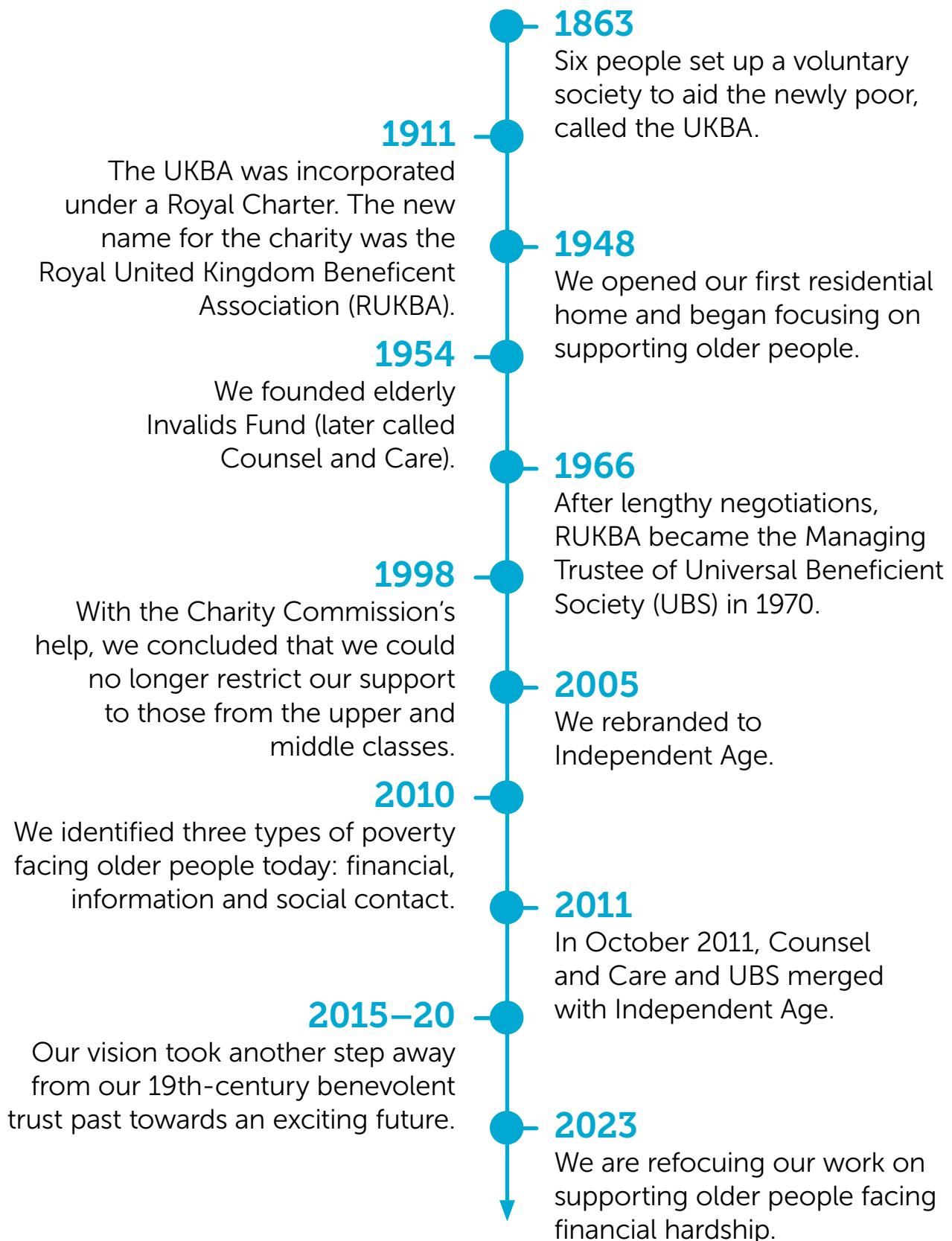
Independent Age is a national charity that supports people facing financial hardship in later life. We use our expertise to influence national policies that impact the lives of older people. We offer practical advice and support, reconnect older people with their communities, and support local organisations that work directly with older people through grant-making and partnership working.

“ *No one should face financial hardship in later life, and we believe there has never been a greater need for our work.* ”



Our history

Although we have been known as Independent Age since 2005, we have a history stretching well beyond that to 1863, when the United Kingdom Beneficent Association (UKBA) was established.



Our people

We employ approximately 150 staff, who are mostly based at our head office in West Kensington, five minutes from Kensington Olympia. We provide flexibility in the way colleagues work, including core hours, a compressed nine-day fortnight and hybrid working (a minimum of four days a month in the office for London-based staff).

We conducted a staff survey in December 2022, which had a 96% response rate and demonstrated the great culture we have built, with an 84% overall engagement score.

We have a network of volunteers that helps us in our work. This could be through helping to fill out benefits forms, facilitating telephone groups, supporting community activity, distributing our guides, or supporting our fundraising or campaigning activities.



92%

of our staff feel they are kept informed of what is happening at Independent Age

88%

of colleagues feel we have a good learning and development programme

94%

of our staff feel they receive support and encouragement from colleagues at work

Our key activities

Policy, influencing and campaigning



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We use the knowledge and insight gained from our frontline services to challenge poor care and campaign for a fair deal for older people – like a reasonable standard of living, fair access to information and an opportunity to contribute to their communities.

Information and advice



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We provide free, confidential advice over the telephone and information resources for older people, their families and carers on issues such as getting help at home, adaptations, care assessments, paying for care and welfare benefits.

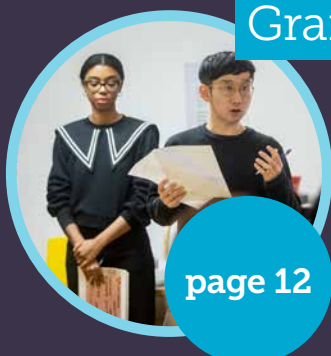
Local community services



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We work alongside individuals, especially those experiencing loneliness and isolation, who are looking to reconnect with their local communities.

Grant-making



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Across the UK, we work in partnership with local charities, funding them to support older people who might be struggling financially.

Policy, influencing and campaigning

We use knowledge from what older people tell us and research projects to inform and influence public debate on older people's issues. Our policy and influencing activity this year – including supporting campaigners, briefing MPs, submitting evidence to inquiries and committees, securing media coverage and delivering petitions – helped keep the pressure on the UK Government, resulting in significant beneficial changes in the 2023 budget.

We want the UK to become the best country in the world in which to grow older. The hard truth is that this isn't the case for many older people in financial hardship.

We ensure the diverse voices of people in later life are heard at the highest level of government, across both Houses of Parliament, Whitehall, the Scottish Parliament and local government.

“ We campaign to make our vision a reality with the support of a UK campaign network of 19,000 individuals.



Poverty in Later Life

Our influential 2022 report, outlines how different groups of people in later life move into or out of poverty or stay in persistent poverty, the reasons for it and how to reduce pensioner poverty, including 20 in-depth interviews with older people experiencing financial hardship.

Pension Credit

Pension Credit is a vital lifeline to many. It is a financial top-up to some of the pensioners who need it most, and has never been more needed than in the current cost-of-living crisis. Our campaigners are demanding that the Government takes urgent action to address the cost-of-living crisis. Following pressure from us and others, the government invested £3 million in Pension Credit awareness campaigns and committed to giving the 1.4 million people who receive Pension Credit around £1,500 each to support them with the rising cost of living – a total investment of around £2.1 billion.

 **Independent Age**

Experiences of poverty in later life

Women

Women are more likely to experience poverty in later life than men, because of the inequalities they face throughout their lives.



Other payments

We also helped secure action from the government to uprate other social security payments like Attendance Allowance, by the September 2022 inflation figure of 10.1%.

Commissioner for Older People and Ageing

Independent Age is calling for an Older People's Commissioner in Westminster, working alongside the devolved nations, to help make the UK the best place in the world to grow old.

 **Commissioner for Older People & Ageing**

 **We support a Commissioner for Older People and Ageing.**

Information and advice

We provide an award-winning free national information and advice service, including our Helpline, specialist advisers and information resources, focusing on the issues that matter most as we grow older.

- In 2022 our Helpline provided direct support to more than 17,000 people across a wide range of topics, including Pension Credit, Attendance Allowance, the cost of living, social care, housing and loneliness.
- We have developed an online technology hub, which in 2022 helped 3,023 people get online, feel safe navigating different types of technology and get extra 'tech' support.
- Our telephone groups allow hundreds of older people who regularly join to chat and connect with each other about their interests.



Local community services

We have community-based connection services in Essex, Nottingham, Guildford and Waverley, and Tyne & Wear and Teesside. Alongside local volunteers, our community teams reconnect people with things they enjoy doing, and help connect organisations and businesses to improve outcomes for older people.



Grant-making

We use grant-making alongside our existing service delivery and policy and influencing functions to build partnerships with other organisations at a local and national level.

- Between May 2020 and July 2021 we awarded £3.3 million – including almost £900,000 from strategic partners – to support 258 organisations with funds in their work with older people during the pandemic.
- In response to the cost-of-living crisis, and with the generous support of the Pension Insurance Corporation, Independent Age recently provided 50 grants of £40,000 (£2m total) to charities and community organisations.
- We have earmarked £750,000 over the next two years to build new partnerships.
- Moving forward, we will build strategic partnerships with organisations operating at a national level to support our aims and continue developing and sharing insight, good practice and capacity building for organisations working with older people.
- We are working with the National Academy for Social Prescribing to support the work of their Older Person's Lead.



Our values and purpose

Our values as an organisation and how we embed them in all we do will be essential to the successful delivery of our strategy, and to the charity we want to continue to build and develop over the next four years.

We are:



Purpose-driven

The experience, needs and views of older people inform everything we do.



Compassionate

We listen, care and take action.



Expert

Our work is evidence-based and solution-focused.



Collaborative

We work in partnership to maximise our impact.



Accountable

We work with integrity and transparency.



Inclusive

We value diversity and always treat everyone fairly with dignity and respect.

We believe that no one should face financial hardship in later life. By 2027 we will have improved the lives of one million older people. We will focus our resources so that older people:

- have sufficient income and receive the financial support they're entitled to
- are protected from unfair or unavoidable costs
- have the connections and support they need in their communities
- live in safe, secure and suitable housing with the care and support they need.

Equity, diversity and inclusion

We celebrate diversity at Independent Age and champion the differences that make each of us unique.

We all have the right to be treated fairly and equitably, regardless of our age, race, colour, ethnic or national heritage, sex, gender identity, sexual orientation, religion/non-religion or belief, marital/civil partnership status, disability or health, neurological differences, pregnancy or maternity/paternity status, parental or caring responsibilities, upbringing, or any other status.

We want everyone who uses our services and those who work for and with Independent Age to feel safe, protected, welcome and included.

Our EDI priorities for 2023

- We will undertake targeted activity to ensure we understand, increase our engagement with, and provide direct and indirect support to people from minority communities and seldom heard groups.
- Through our work with older people facing financial hardship, we will gather evidence, campaign to change policies and practices that affect older people from minority communities and seldom-heard groups.
- We will undertake continuous internal (including staff, trustees, volunteers) and external (including older people who use our services, grantees, campaigners) gathering of data and information to identify where more action is required.
- We will ensure our recruitment practices for staff and volunteers promote EDI so that we can recruit diverse talent.
- We will build an inclusive culture across our organisation.



Our finances

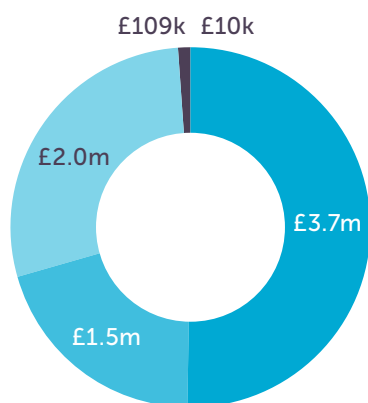
Independent Age is privileged to have strong reserves, which totalled £178m as of 31 December 2021, including £63.3m of endowment funds and £12.1m of restricted funds. The majority of our reserves are held as investments, and we also hold some investment properties.

We are currently preparing our annual report and accounts for 2022 for audit. We had a planned deficit in 2022 and experienced investment losses, and so ended the year with reserves in the region of £163m.

In 2021 our total expenditure was £12.5m, of which £10.5m was on charitable activities and the balance on the cost of raising funds. Our charitable expenditure accounted for 84p of every £1 of spending in 2021, compared with 86p in 2020.

Our overall income

In 2021 we generated a fantastic £7.3 million to help support older people in greatest need, their families and carers. This included individual donations, income from trusts and corporate supporters, investment income and a number of very generous gifts from supporters who remembered us in their wills.

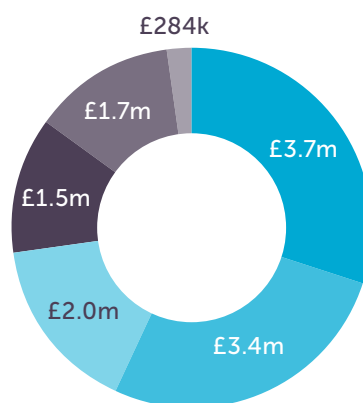


Income by type

- **Investments**
50% / £3.7m
- **Legacies**
20% / £1.5m
- **Donations**
28% / £2.0m
- **Other trading activities**
1% / £109k
- **Other income**
<1% / £10k

Our overall spending

In 2021 we spent £12.5 million to transform the lives of older people in the UK. This included £10.5 million in charitable expenditure, and an investment of £1.7 million in activities to generate long-term voluntary income as we seek to sustainably grow our vital work.



Expenditure by activity

- **National services**
30% / £3.7m
- **Community services**
27% / £3.4m
- **Policy and influencing**
16% / £2.0m
- **Grant-making**
12% / £1.5m
- **Raising voluntary income**
13% / £1.7m
- **Investment and property management**
2% / £284k

We had a planned operating deficit in 2021 of £5.1m. A gain of £16.5m on investment assets resulted in net income of £11.4m.

Our charitable expenditure included national services (£3.7m), community services (£3.4m), policy and influencing (£2.0m) and grant-making (£1.5m).

In 2020, we set up a grants-fund to support smaller charities working with older people at greatest risk from COVID-19, expending a total of £3.3m following a commitment of £2.5m in grants. In the autumn of 2022, in response to the cost-of-living crisis, and with the generous support of the Pension Insurance Corporation, we committed 50 grants of £40,000 (£2m total) to charities and community organisations. Moving forward, we aim to increase our grant-making activities.

We also continue to make regular grant payments directly to older people, although we no longer accept new applications for direct support. We paid out £724,000 in 2021 (2020: £1.1m) to more than 1,000 older people as part of this programme.

In 2021 our income was £7.3m, of which £3.7m came from investments and £3.5m from donations and legacies. Our net voluntary income in 2021 was £1.9 million.

We are aiming to increase and diversify our income to reduce the need to hold investments. This includes legacy income, growing our events income and building a high-net-worth fundraising programme, while continuing to invest in generating increased income from corporate partnerships and trusts and foundations. We recently launched a commercial income generation project pilot called Differently.

Our strategy

Independent Age's history and expertise are rooted in alleviating financial hardship in later life; supporting people facing financial hardship has been our priority since our foundation. In the past decade, we have developed our expertise on poverty in later life through numerous reports, comprehensive information and advice offers, and our campaigns and communications.

During 2022 we conducted a fundamental review of our current strategic focus, which was considered too broad to deliver a coherent impact for older people and clear, distinctive profile-raising and income-generation activities.

Older people in poverty are a very diverse group, but we can identify which older people are most likely to face financial hardship. People facing financial hardship in later life who experience inequalities often have protected characteristics – for example, the prevalence of poverty is much higher among Asian and Black ethnic groups.

Our data found that 19% of Black older people find it difficult to get by financially, compared with 2% of older white people. There is also a gender divide, with 20% of women aged 65+ living in poverty compared to 16% of men. These figures are worse for single women.

There is much overlap in these groups: for example, women are more likely to be aged 85+, single and living alone. Similarly, Black, Asian and other ethnic minority groups are much more likely to rent and live in inner cities.

More than 2 million

older people in the UK are living in poverty

Our strategic ambition is that by 2027 we will have improved the lives of one million older people.

We will work together with our partners to ensure that older people:



have sufficient income and receive the financial support they're entitled to



are protected from unfair or unavoidable costs



have the connections and support they need in their communities



live in safe, secure and suitable housing with the care and support they need.

To deliver this ambitious objective, we will work directly with older people facing financial hardship, identifying ways to improve their lives. We will use evidence and our expert knowledge to campaign to change policies and practices.



We will always be there for older people facing financial hardship, who are looking for trustworthy, independent information and advice. Additionally, we will support local partner organisations working with older people financially through grants and practical support.

The role

The role of CEO is a career-defining opportunity to build on a strong existing platform at Independent Age and to position the charity as a leading voice and the go-to organisation for older people facing financial hardship and others wishing to help them.

Reports to the

Chair of the Board of Trustees

Line manages the

- Senior Leadership Team:
 - Director of Services
 - Director of Policy and Communications
 - Director of Finance
 - Director of Income Generation
 - Director of Corporate Services
- Executive Assistant to the CEO

Job purpose

The CEO works with the Board of Trustees and Senior Leadership Team to set and implement an effective strategy to achieve Independent Age's mission. They provide inspirational leadership, and ensure that the charity is well governed, funded and managed. They are our leading spokesperson, building relationships and partnerships to help raise our profile and impact.

Key responsibilities

Strategy, leadership and management

- Develop and implement an effective strategy for impact, working closely with the Chair, Trustees and Senior Leadership Team.
- Ensure that the charity is effectively governed and maintains high standards of best practice, fulfilling all legal, statutory and regulatory responsibilities.
- Provide inspiring, empowering and effective leadership, direction and oversight to Independent Age to maximise the impact for older people facing financial hardship.
- Develop and lead a high-performing Senior Leadership Team that designs and delivers on plans, manages risk and generates opportunities for the future.
- Ensure that plans and activity are informed by the lived experience and views of older people who face financial hardship.
- Regularly review and assess the external environment, the changing landscape for charities, regulatory requirements, and best practice to ensure Independent Age operates effectively, anticipates change, and identifies new opportunities to achieve its mission.
- Facilitate change and transformation to ensure that we deliver impact now and in the future.
- Ensure that Independent Age has policies, systems and processes that are proportionate, fit for purpose and ensure it is both effectively and efficiently run.
- Review risks and ensure that systems are in place to manage and mitigate risks.
- Ensure that an EDI strategy and plans are integrated across all activities and embedded in our culture.
- Set and maintain KPIs to monitor progress and assess impact.
- Provide timely, accurate and appropriate management information to the Board.

Communication and networks

- Cultivate and maintain effective networks, strategic relationships and partnerships to raise the profile and impact of Independent Age.
- Act as our main spokesperson in the media and elsewhere.
- Act as a thought leader by sharing insight into relevant matters and enhancing our profile.
- Maintain strong relations with UK Government departments that deal with relevant issues.

Financial planning, management and fundraising

- Enable sustainable growth, reach and impact through effective income generation, fundraising and financial strategies.
- Develop robust annual business plans and budgets, ensuring that financial resources are used prudently and effectively to achieve our goals in service of older people.
- Work with the Board to protect Independent Age's assets with propriety and accountability.

General responsibilities

- Model and embed our values and behaviours.
- Share in our commitment to promoting welfare and safeguarding adults at risk of harm and any children or young people connected with them that we may come into contact with through our work.
- Ensure that information is obtained, used and stored in accordance with our Data Protection and Confidentiality policy.
- Undertake any other duties as required by the Chair of Trustees on behalf of the Board.

Person specification

We are looking for an exceptional strategic leader with the internal and external leadership and ambassadorial skills to drive our vision forward and achieve real impact for our organisation and our beneficiaries.

Knowledge and experience

- Significant leadership experience at director or CEO level, ideally within a charity context, with a demonstrable track record in setting and delivering strategies and transformational change in an organisation of a comparable scale.
- Strong ambassadorial skills with a successful track record of building organisational profile and reputation.
- Strong stakeholder management experience with a track record in establishing, developing and maintaining significant partnerships.
- Strong internal leadership experience, with a track record of leading a senior management team and promoting a strong working culture.
- Demonstrable experience of working with boards and understanding of good governance.
- Strong financial and commercial acumen, proficient at budgeting and planning, and an understanding of income generation and voluntary fundraising.
- An understanding of grant-making, philanthropy and funding ecosystems.

Skills and attributes

- Mission- and impact-driven with a demonstrable passion for, and affinity with, our cause.
- A strategic, big picture thinker, who can draw organisational strands and themes together and deliver results.
- A strong leader who can inspire people and lead through change.
- A collaborator, who is comfortable working cross-functionally and in coalition with others.
- A performance- and solutions-oriented professional, able to work at pace and drive a strategy forward to achieve real impact for an organisation.
- Compelling and persuasive speaker, listener and writer who can communicate engagingly with a wide range of internal and external stakeholders.
- Demonstrable commitment and ability to engender a culture faithful to our EDI principles.

Terms of appointment

Location

Avonmore Road, London, W14 8RR.

Candidates will need to be visible in the London office on a regular basis and able to travel, alongside some flexible working.

Salary

Circa £110,000 per annum.

Benefits

- 28 days annual leave plus public holidays.
- a generous pension scheme with up to 10% employer contribution (if employee contributes 6%), and salary sacrifice pension option.
- 5 x life cover (if in the pension scheme).
- A cycle-to-work scheme.
- An employee assistance programme.
- Season ticket loans.
- Fantastic learning and development opportunities.

DBS check requirements

DBS basic.

How to apply

Saxton Bampfylde Ltd is acting as an employment agency adviser to Independent Age for this appointment.

Candidates should apply for this role through saxbam.com/appointments using code NANXC.

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

The closing date for applications is 9am on Thursday, 27 April 2023.






Independent Age


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Registered charity number 210729
(England and Wales) SC047184 (Scotland)