



**Independent  
Age**

A photograph of an elderly man with a long white beard and glasses, wearing a white cap and a dark green jacket, sitting at a table and working on a craft project with colorful confetti.

# Appointing a Director of Services and Grants

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Cover image: Abdus attending the men's yoga and meet-up group at Birmingham Asian Resource Centre.

# Introduction from our CEO

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Every day, my colleagues and I hear from people in later life who are struggling financially. While they are resourceful, careful and resilient, and employ many tactics to make their low income work for them, life is hard.



The older people we engage with – through our services, grant-giving, campaigning, research and volunteering – tell us about their increasingly unaffordable high rents, the anxiety they feel when they receive their utility bills, worries about how they will pay for healthy food and their uncertainties about how they will survive living on a low income.

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

There has never been a greater need for Independent Age's work. More than two million older people are already in poverty, and millions more live their lives on the brink with precarious finances. We help them gain access to the financial benefits that are rightfully theirs and avoid the extra costs that people in poverty pay for essential products and services, enabling them to have greater choice and independence in wider areas of life.

I hope you are as concerned as I am about the growing impact of poverty in later life on our society, and energised by the opportunities for Independent Age to make a positive difference in the lives of older people most in need.

We are currently searching for a new Director of Services and Grants with the required experience and energy to drive us forward through our next phase of growth and development. We are aiming to find an ambitious, visionary leader who has a real passion for our cause and will be highly motivated by the opportunity to help Independent Age maximise its impact.

With your strong strategic and operational leadership skills, along with your ambassadorial approach to partnership-building, evidence-based methodology and effective communication with external stakeholders, we can make an even more meaningful difference in the lives of older people facing financial hardship.

We would be delighted if you considered applying to join our inspiring and dedicated team.

Joanna Elson, CBE



# About Independent Age

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Independent Age is the only national charity focused on improving the lives of people facing financial hardship in later life.

Our Helpline and expert advisers offer free, practical support to older people struggling with their finances. Through our grants programme, we support hundreds of local organisations working directly with older people across the UK.

We use the knowledge and insight gained from our support services and partnerships to highlight the issues experienced by older people facing financial hardship and campaign for change.

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



Thabani



Belarmino

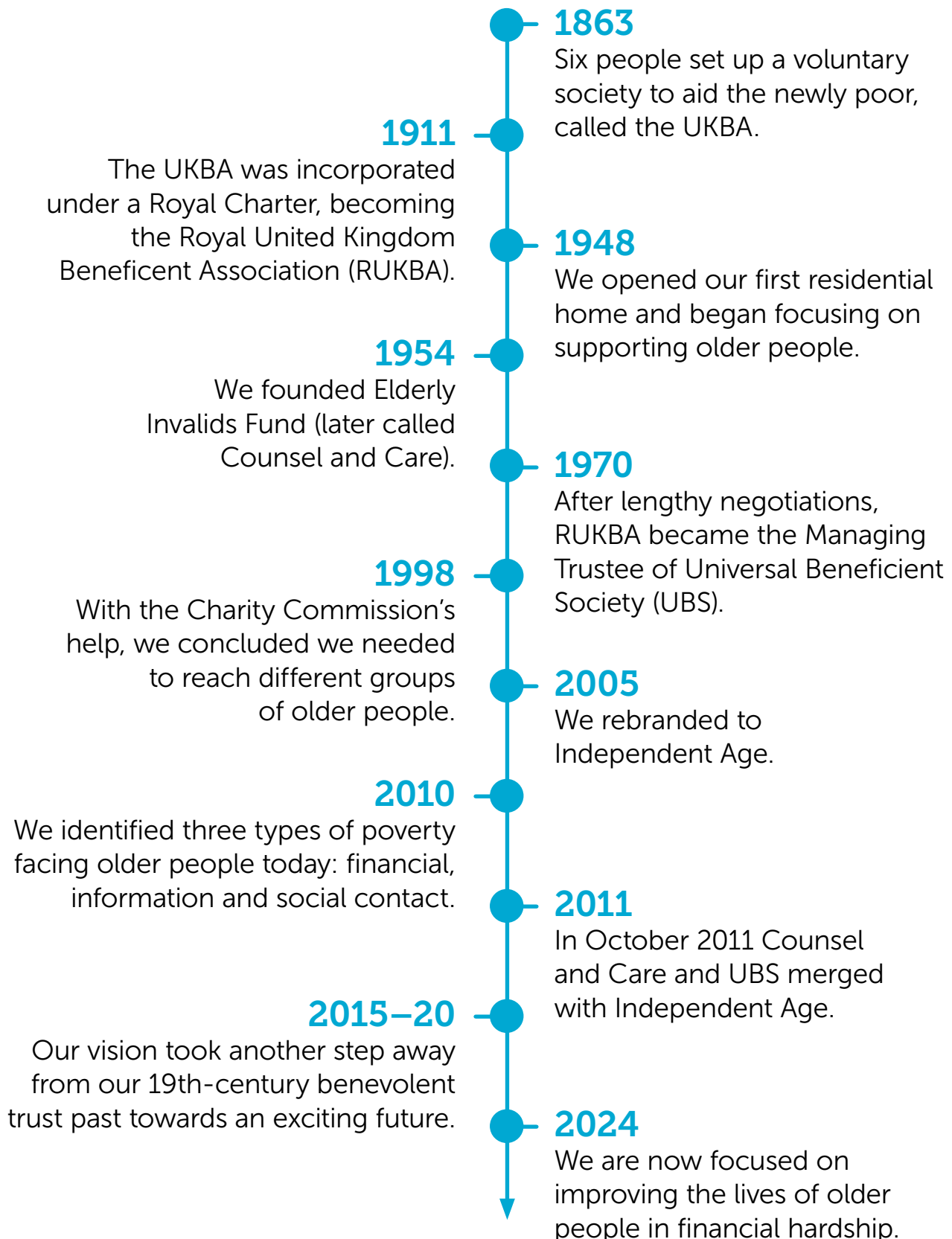


Yvonne

# Our history

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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 strategy

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There has never been a greater need for Independent Age's work. More than two million older people are in poverty, with potentially millions more living with precarious finances and facing real financial hardship.

**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.**

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 with numerous reports, comprehensive information and advice offers, and our campaigns and communications.

Living in financial hardship affects older people's health, intensifies loneliness and reduces their quality of life – so we can and must work to prevent and alleviate it. Poverty affects people of all ages, but it's those in later life who are often on the receiving end of broad ageist assumptions and stereotypes about their financial situation.

The individuals who make up this group are often invisible, overlooked and unheard – and the dream of a carefree, financially secure retirement is anything but reality.

Our research and analysis identified certain groups of people aged 65 and over who are at greater risk of facing financial hardship, including:

### **single people**



### **private renters**



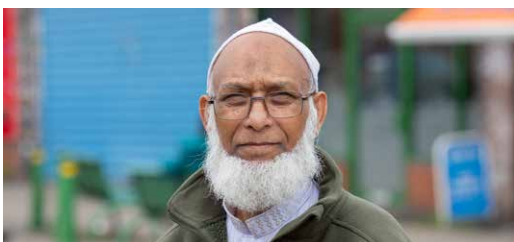
### **women**



### **older carers**



### **people from minoritised ethnic communities**



### **people with long-term conditions or disabilities.**



At Independent Age, we want to make sure the voices and experiences of those facing financial hardship in later life are amplified. We want their problems recognised and taken seriously by decision makers. We want them to have the money they're entitled to, avoid high costs, and live in a warm, safe home with the support they need to live as they choose. And we will work tirelessly to achieve this goal. Our impact across policy campaigning, information and advice, grant-making and partnerships improve lives by increasing the financial wellbeing of older people in financial hardship – enabling greater choice and independence in wider areas of life.

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



More than three million older people are living with limited financial means and experiencing inequalities that affect their quality of life, ability to make choices and independence.

## Our objective by 2027

We will have improved the lives of **one million** older people facing financial hardship.

We will ensure older people facing financial hardship...

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

are protected from unfair or avoidable **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

## How we'll do it

**Work directly** with older people facing financial hardship to improve their lives

**Use evidence** and our **expert knowledge** to campaign to **change policies** and practices

**Support organisations** financially through **grants** and **practical support**

**Work with others** to explore **innovative** ways of providing **support** and improving the lives of older people facing financial hardship

## Who we work with and for

Charities, community organisations, partners, businesses and grant recipients

Donors, volunteers and supporters

Families, friends, neighbours, and health and social care professionals

Policy and decision makers, media

People beyond state retirement age facing financial hardship, on a low income or in areas of multiple deprivations



# Our key activities



## Information and advice

We provide free, confidential advice over the telephone, by email and on webchat, and information resources for older people, their families and carers on issues affecting older people in financial hardship.



## Grant-making

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 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.

# Our services and grants directorate

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## Information, advice and support

- We provide a quality-assured free and independent national information and advice service, including our Helpline, specialist advisers, telephone groups, webinars and information resources, focusing on issues affecting older people in or facing financial hardship. In 2023 we provided direct support to more than 15,000 people across a wide range of topics, including Pension Credit, Attendance Allowance, the cost of living, social care, housing and connection with their community.
- Following Board approval, in 2024 we are investing in our information and advice services, including expanding the size of the team and merging our existing advice and Signposting+ services into one new advice and support service. Our aim is to enable older people to increase their income, reduce their costs, be connected to their communities and improve their housing.
- Our service will soon include live transfer to an adviser from the Helpline and provide short-term casework support. This investment will significantly increase our capacity and improve the experience of older people contacting us for help. We're building our network of charity and commercial partnerships to ensure as many older people as possible know about Independent Age and the support we offer.
- In addition to direct support, we provide training to professionals and volunteers in the community to increase knowledge of key welfare benefits and entitlements, as part of our capacity-building strategy. In 2023 we trained 560 people, reaching an estimated 8,400 older people. We're set to grow our training offer over 2024 and 2025.



## Grants and partnerships

Our local grant-making programme ensures we reach individuals in those groups most affected by poverty. Additionally, 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.

- In 2023 we awarded £2.4 million to more than 80 organisations and strategic partners to support initiatives addressing financial hardship.
- This year we are awarding up to £5 million through grant initiatives aimed at boosting advice provision for older people, and at funding support for the priority groups identified through our research as more likely to be in financial hardship.
- We have allocated at least £4 million a year over the next two years to continue to address local financial hardship support in our four key impact areas.
- 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.



Owen



Birmingham Asian Resource Centre

# Our values

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Our values as an organisation and how we embed them in all we do will be essential to successfully delivering our strategy, and to the charity we want to continue to build and develop.

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.



# Equity, diversity and inclusion

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We celebrate equity, diversity and inclusion (EDI) 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 current EDI priorities

- We will undertake targeted activity to ensure we understand, increase our engagement with, and provide direct and indirect support to older people from minoritised communities and seldom heard groups.
- Through our work with older people facing financial hardship, we will gather evidence and campaign to change policies and practices that affect older people from minoritised 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

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Independent Age is privileged to have strong reserves, which totalled £164 million as of 31 December 2022. The majority of our reserves are held as investments, and we also hold a small number of investment properties.

In 2022 our total expenditure was £13.4 million, of which £11.2 million was on charitable activities and the balance on the cost of raising funds.

We also continue to make regular grant payments directly to older people, although we no longer accept new applications for direct support.

We are currently preparing our annual report and accounts for 2023.

At the end of 2023 the Board approved our new fundraising strategy, which aims to increase and diversify our income to reduce the need to hold investments. This includes building awareness of Independent Age to help us grow individual giving and legacy income, increasing 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.

# The role

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Director of Services and Grants

## **Reports to the**

Chief Executive Officer

## **Line manages the**

- Head of Grants and Partnership (team of approximately four)
- Head of Services (team of 39 budgeted for in 2024)
- Possible Head of Training or similar.

## **Job purpose**

To ensure that our multichannel services and grants serve and improve the lives of older people in financial hardship, including reaching those groups who are most likely to be in poverty.

To be accountable and responsible for the strategic leadership and management of the directorate, ensuring budgets, plans and activities align with Independent Age's strategy and have maximum impact for older people.

As a member of the Senior Leadership Team (SLT), to provide inspirational and transformational leadership, developing and executing the strategy to ensure we deliver our mission efficiently and effectively and with a strong focus on increasing our impact and reach.

## **Key responsibilities**

### **Strategy and impact**

- Work closely with the CEO and other senior colleagues to continue to develop how we deliver our overarching strategy and ensure that translates into operational plans.
- Ensure the development of a learning organisation through continual evaluation and review of activities, effective feedback loops and a focus on impact.
- Provide timely, accurate and appropriate management information to senior colleagues and our Board.

## **Leadership and management**

- As part of the SLT, provide inspiring, empowering and effective leadership, direction and oversight to Independent Age to maximise the impact for older people facing financial hardship.
- Lead and develop a high performing, integrated services directorate with a collective sense of purpose, managing the Services Leadership Team to develop robust and cost-effective departmental plans, budgets, objectives, KPIs, risk logs, policies and protocols.
- Perform a leadership role in championing and delivering our EDI priorities.
- Be accountable for the relevant directorate budgets, ensure compliance with financial regulations and maintain a focus on value for money.

## **Operational delivery and impact**

- Provide strategic direction and leadership for all Independent Age's services – which currently include the Helpline and our information and advice service – ensuring that services developed and offered align with our strategic focus and EDI priorities, are high quality and deliver maximum impact for older people.
- Ensure that Independent Age delivers significant impact now and in the future, by setting SMART KPIs and monitoring and reporting against them.
- Support income-generation colleagues, working with them to demonstrate the impact and significance of our work and to bid for resource to enhance our services and ensure financial sustainability through commissioned, fundraised or commercial income.
- Oversee the development of strategic partnerships with local and national stakeholders, and best-in-business consultants and suppliers, ensuring cost-effective service, clear compliance and a commitment to Independent Age's values and goals.
- Undertake regular horizon scanning to establish opportunities, risks and ways to improve effectiveness.
- Ensure that robust safeguarding policies, practices and processes are in place across the services directorate.



- Represent Independent Age externally at a senior level, including acting as a media spokesperson to raise awareness, campaigning for policy change, building understanding and driving action.
- Be inclusive of all stakeholders, especially older people living in financial hardship, when reviewing or developing new services.
- Prepare proposals, reports and updates for the Board of Trustees and subcommittees about our services strategic direction, activity and KPIs.
- Take responsibility for how volunteers support our service delivery now and in the future.
- Be ready to take on responsibility for a potential enhanced training function (for Independent Age, other charities and commercially) following a current review of these issues.

### **General responsibilities**

- Embrace diversity and share in our commitment to equality of opportunity and to eliminating discrimination.
- Model and embed Independent Age's 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 commensurate with the level of the role.

# Person specification

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- A demonstrable passion for, and affinity with, our cause.
- Experience of operating at a senior level, ideally as part of a senior leadership team.
- Experience of working with boards of trustees.
- A track record of successfully developing and leading services, including contact centres.
- Understanding of demonstrating and reporting on impact, and how this drives positive change.
- Demonstrable experience of building strategic partnerships and national networks.
- An understanding of strategic and emergency grants programmes.
- Experience of successfully supporting fundraising for services, preferably including with corporates, and of bidding for contracts.
- Demonstrable experience of managing transformation and change and development.
- Experience of effectively developing and managing budgets or holding significant financial accountability.
- Excellent interpersonal and relationship-building skills based on our core values.
- An understanding of best practice in safeguarding adults at risk of harm.
- Experience of managing, supporting, developing and motivating colleagues, in face-to-face, remote and hybrid environments.
- Ideally experience of developing an external training offer.

# Terms of appointment

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## Location

Avonmore Road, London W14 8RR.

The successful candidate will need to be in the London office a minimum of one day a week (two days a week initially) and be able to travel, alongside some flexible working.

## Salary

£83,423, increasing to £85,733 after six months and £88,017 after 12 months.

## 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.
- 5x life cover (if in the pension scheme).
- Option to work hours over a five-day week or a nine-day fortnight.
- 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

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To apply, please submit a curriculum vitae and a supporting statement, detailing how your skills and experience meet the criteria within the job description and person specification, by visiting [jobs.independentage.org](https://jobs.independentage.org). Please do not hesitate to contact us if you have specific requirements and need support to apply in an alternative format.

To support our commitment to EDI, we use anonymous shortlisting. So, please do not include your name, photo or information to indicate your gender or age in your CV and supporting statement, and please ensure the title of any uploaded files do not contain your name. Please do not omit dates of employment, however.

Independent Age is committed to safeguarding and follows safer recruitment practices to ensure we are safeguarding those we work with. We therefore ask that you supply your full work history, with explanations for any gaps, in the application documents you submit. If you are offered the role, we will require two employment references, including your current or most recent employer.

**Closing date for applications is end of day on Monday, 8 April 2024.**

**First-round interviews to be held on Wednesday, 1 May and Thursday, 2 May 2024.**

**Second-round interviews to be held on Thursday, 16 May 2024.**





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