

## Recruitment Pack

### Person specification

In addition to the key competencies, you will have some of the characteristics below:

#### Qualities

- A commitment to the PPI's vision and mission.
- Integrity.
- Exhibit good inter-personal and relationship building abilities.
- Comfortable working on your own as well as collaboratively both remotely and in-person.
- A commitment to diversity and inclusion.
- The ability to:
  - Remain positive in adverse situations.
  - Adjust style and approach to maximise team and individual performance and foster good working relationships across a diverse team.
  - Recognise trends, changes in circumstances and stakeholder requirements promptly and adjust standards and services accordingly.
  - Review situations, assess risk and seek and interpret advice when needed.

#### Knowledge

- Understanding of or willingness to learn about:
  - A research organisation.
  - The pensions/financial services industry and/or later life issues.
  - The governance and financial issues and context within which UK charities operate.
  - Marketing, parliamentary and public relations outreach.

#### Experience

- Working strategically at executive and senior management levels.
- Managing staff and relationships in a hybrid environment.
- Securing project contracts and funding including grants.
- Promoting and representing an organisation.
- Managing projects and resources, and their delivery in a timely and efficient manner.
- Influencing, networking and collaborative working skills and the ability to win support from key external stakeholders.
- Communicate effectively in meetings, presentations, and committees and across a wide range of media including articles, briefs, formal written reports, internal communications, and publicity materials.
- Chairing meetings and events such as roundtables and research launches. Participating in advisory / steering groups and other external meetings.

## Role Responsibilities

The PPI is a small organisation, and as such all members of the PPI team are able, and expected, to contribute to the running of the PPI. We have a collaborative and flexible approach to working and would be particularly interested in your additional skills and expertise that would be beneficial to the institute.

The specific responsibilities of the Deputy Director will depend upon the skills and experience you bring and the delegations to Senior Leaders. We are open to candidates who are proven in some areas and open to development in others, as we have the flexibility of tailoring the specifics of the role to the right candidate.

Below is an example of the responsibilities we expect the role to cover:

### Strategic Development and Leadership

- Support and deputise for the Director.
- Support the Trustee Board and Committees to deliver their terms of reference.
- Help foster a working environment that staff find rewarding, enjoyable, and allows a work-life balance.
- Support the development of the PPI strategy, budget and its implementation.

### Funding, Income and Budget Management

- Ensure a sustainable income from a variety of sources; members, grants and sponsors. Identify possible new sources.
- Determine, agree, and meet targets for sponsored research and research grants.
- Cost proposals for research for sponsored work considering existing commitments and future ones in terms of resourcing, topics and timing.

### Leadership and management of research programme and team.

- Develop and manage research programme, plans and topics.
- Manage resource across the entire research programme, ensuring each project is adequately resourced, planned and delivered in a timely manner.
- Identify development potential and opportunities for the research team and ensure they have opportunities to develop skills and expertise to benefit the PPI and their own careers.
- Evaluate effectiveness of resource allocation and pricing of sponsored research and adapt approach accordingly.

### Lead external relationships and collaborations.

- Broaden recognition of the PPI's work in the research community and with the media, securing a place in the ongoing policy debate.
- Engage with existing and prospective key stakeholders in the research and policy arenas.
- Ensure that PPI research is appropriately represented in the media.
- Secure appropriate opportunities for the public dissemination of findings.
- Ensure that PPI participates in the research work of other organisations sufficiently to ensure no unnecessary overlap or duplication.
- Represent the organisation to the media and give interviews, sit on panels and chair events as required.

## Monitoring and Reporting

- Establish and monitor key indicators of the organisation's impact and financial health, especially for the research teams.
- Ensure a supply of regular reports to the board of trustees and attend board of trustees and committee meetings on the current research agenda, delivery and future plans.
- Input into the identification of risks and changes in the external environment that affect the organisation.
- Support the Head of Finance to ensure the organisation fulfils its legal, statutory and regulatory responsibilities, e.g. oversight and authorisation of payments, reconciliation of accounts, timesheets.


## Quality assurance

- Oversee and ensure the quality, accuracy and independence of PPI research outputs.
- Ensure PPI models are robust and fit for purpose, supporting the overall policy research arena.

## Special Projects and other work

- Oversight and management of the Pensions Data Project and its long-term implementation.
- Oversight and management of strategic projects.

## About the PPI

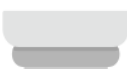
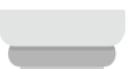

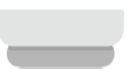
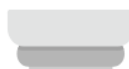
 **The PPI Pillars of Purpose** Date  
April 2024

**Our Vision**

**Our vision:** Better-informed **policies** and decisions that improve later life outcomes

**Our Mission**

We promote informed, evidence-based **policies** and decisions for financial provision in later life through independent research & analysis

 <p>We provide relevant and accessible information on the extent and nature of financial provision in later life, <b>and any associated implications</b></p>	 <p>We <b>lead the debate</b> and contribute fact-based analysis and commentary to the policymaking process</p>	 <p>We encourage research on later life provision (at the PPI and with others) that <b>informs policy and decision-making</b></p>	 <p>We are a <b>trusted source of information and analysis and impartial feedback to those</b> with an interest in later life issues</p>	 <p>We <b>model the impact of policy changes</b> on financial provision in later life</p>
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**Our Culture**

We have a flexible and inclusive approach that runs throughout the institute. We believe that progress towards a common goal is made by making the best use of our own diversity and strengths including those of others. Therefore, we are collaborative in our approach as a team and how we work with stakeholders within our research projects and activities