

## Pensions Policy Institute (PPI) – Deputy Director

Are you passionate about improving later life outcomes?

Do you want to be involved with an institute that strives to facilitate these improvements?

Do you want to actively support shaping better policy?

If you have answered yes to these questions, then we can provide you with the opportunity to work with us. The Pensions Policy Institute (PPI) leads the policy debate by contributing fact-based analysis and commentary to the policymaking process, where we have been for over 20 years.

**This is an exciting opportunity to play a pivotal role in ensuring the PPI maintains its excellence in research and continues to grow. The Deputy Director leads the research teams (Policy and Modelling) with an emphasis on strengthening the PPI's research profile, impact and positioning while further growing its research income.**

We have a collaborative and flexible approach to working which is key for this role as you will be working in partnership with the Director, the Trustee Board, and other Senior Team Leaders. We also seek a diverse range of skills and experience as we are currently in the process of a strategy review and facilitating greater delegation from the Executives to Senior Team Leaders. Therefore, there is opportunity for your skills and experience to further define the main responsibilities of the role as we work through the delegations and structure of the institute.

### Main responsibilities

- Lead an evaluation of current markets and growth opportunities and develop a strategy for new business development.
- Leadership and management of the research programme and teams.
- Lead external relationships, negotiations and collaborations.
- Strategic development of the organisation.
- Funding, income, and budget management, including resource utilisation.
- Reporting and monitoring.
- Quality assurance.

### Key Competencies

- Proven track record at leadership level in business development, partnerships management, or a related role.
- Ability to negotiate, influence, network and build relationships.
- Ability to represent the PPI with governments, regulators and heads of organisations and institutions.
- Strong proficiency in market evaluation, negotiation, and contracting.
- Excellent interpersonal, influencing and networking skills and able to communicate across diverse audiences.
- Long-term and strategic thinker, with the ability to see connections between different elements of the landscape and bring them together to identify possible impacts on the current later life environment.
- An analytical thinker who is focussed on increasing impact in line with the Institute's mission.

- Resilient, able to lead positively in a role which carries significant responsibility and requires the ability to prioritise effectively across multiple areas of work, problem solve and demonstrate strong organisational and planning skills.
- A values-led leader, who demonstrates integrity, respect for others and a commitment to equity, diversity and inclusion.
- An experienced people manager, able to lead and inspire others, offering kind and constructive support to others enabling them to improve their impact and performance.
- Ability to support the financial management and business development of a small organisation, including the capacity to identify new opportunities and support the development and costing of new projects/activities and income streams.

### About the PPI

We are an independent research Institute established in 2001 to help improve later life outcomes by providing evidence to shape policy. We provide fact-based research which informs policy discussions on pensions and retirement income provision. We have a proven track record in analysing future trends within the policy landscape including social, economic, technological, and demographic changes.

We aim to improve information and understanding about pensions and the financial and economic provision in later life. We do not lobby for any particular policy outcome, and we do not take politically influenced views. Our research is most relevant at the policy-making level, nevertheless we play a role in raising the wider understanding of pensions and retirement income provision. The PPI works with government and a wide range of organisations and academics with an interest in pensions and financial provision for later life.

### Employee benefits

We strive to treat our employees well and offer a range of benefits:

- Salary commensurate with experience and knowledge.
- Continued professional development.
- Flexible working arrangements.
- Central London office location.
- 25 days annual leave plus closure between Christmas and New Year.
- Carers leave.
- Leave for volunteering.
- Membership of the PPI's Group Personal Pension (initial 8% employer contribution with an additional matching contribution for every 1% employee contribution up to 4%).
- Group Income Protection and Life Assurance.
- Employee Assistance Care Programme.
- Payment of professional membership fees.
- Salary Range: £85,000 - £95,000 per annum

### Location

We are a hybrid organisation and operate a remote working policy which means staff work sometime in the office and sometime remotely. It is important that the successful candidate builds strong relationships across the team as a whole and with our stakeholders. Because most of our audiences and sponsors are mainly based in London, the successful candidate will be required to be London based or able to be in

London on a frequent basis. We therefore anticipate that the normal place of work will be at the PPI office in Holborn, London.

### Diversity and Inclusion

The PPI recognises and promotes the values of diversity and inclusion as fundamental to all our policies and practices. Everyone is different and has something unique to offer. The PPI wants to respect and understand these differences and to make the most of everyone's background, talents and abilities. The PPI is committed to promoting an inclusive environment where all can be themselves, are valued for their differences, and are supported to work at their best. We therefore aim to ensure that the values of inclusiveness, diversity and respect for all are embedded in everything that we do. This includes identifying policy initiatives which are likely to reduce inequalities in the UK Pension system.

We aim to build, develop and retain a talented workforce that represents a variety of backgrounds, skills and experiences. We welcome and actively encourage applications from anyone who feels they'd be a good fit for our organisation, regardless of race, religion, colour, age, sex, national origin, sexual orientation, gender identity, disability, neurodiversity or any other protected characteristics.

### Application process

**Closing date for applications:** Monday 13 May 2024

**Interview period:** To be held in June 2024

Please inform us if you intend to be away during this period.

**If you are interested in applying for the position of Deputy Director applications should be emailed for the attention of the Director, Chris Curry, to [janine@pensionspolicyinstitute.org.uk](mailto:janine@pensionspolicyinstitute.org.uk):**

This post profile is not set in stone. It gives insight into the main purpose of the role, and expected responsibilities, but it might be reviewed in the future to meet the changing requirements of the PPI, any changes will be made in discussion with the post-holder.

We want the recruitment process to give you the opportunity to share your skills and experience, and to find out more about the PPI. You are welcome to get in touch and arrange an informal chat with the Director or current Deputy Director before applying, please contact [janine@pensionspolicyinstitute.org.uk](mailto:janine@pensionspolicyinstitute.org.uk) to arrange.

Applications should include:

1. A cover letter (not more than two A4 sides) telling us about yourself with:
  - How you meet the key competencies, person specification and responsibilities.
  - Your motivation for applying and how you would benefit the PPI.
  - Your notice period.
2. A CV with the names of 2 referees (one current/most recent employer and/or prior employer, they will not be contacted without prior consent).

We can accept videos or recordings for those who have difficulty typing.

The successful candidate will be required to provide evidence of the right to work in the UK.

**As part of our inclusive culture, the shortlisted candidates will be required to complete a strength-based assessment.**

The PPI takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused, or disclosed, and is not accessed except by our employees in the proper performance of their duties.

## Deputy Director 2024



For more information on the responsibilities and person specification, please see the Recruitment Pack.

## Recruitment Pack (possibly separate pdf depending on where advertised)

### 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

We provide relevant and accessible information on the extent and nature of financial provision in later life, **and any associated implications**

We **lead the debate** and contribute fact-based analysis and commentary to the policymaking process

We encourage research on later life provision (at the PPI and with others) that **informs policy and decision-making**

We are a **trusted source of information and analysis and impartial feedback to those** with an interest in later life issues

We **model the impact of policy changes** on financial provision in later life

### 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