Candidate pack for Chief Executive

Friends Provident Foundation

Starfish

Welcome

Dear Candidate

Thank you for your interest in becoming the next Chief Executive Officer of Friends Provident Foundation. This is a significant moment for us, as we navigate a change in leadership after two decades under the stewardship of our current Director, Danielle Walker Palmour, who will retire in early 2027.

Friends Provident Foundation exists to connect, fund, support and invest in new thinking to shape a future economy that works for all of us. Rooted in Quaker values of equality, justice and stewardship, we deploy the whole of our endowment in pursuit of that mission, not just our grants and social investments. Over the past twenty years we have helped build a movement of organisations working to reimagine our economic systems, through an ambitious portfolio of grants and social investments, a proactive approach to our own investment practice, and by convening those at the leading edge of economic systems change.

We are now looking for a new Chief Executive Officer to lead Friends Provident Foundation into its next chapter. Working closely with an engaged and ambitious Board of Trustees, you will have real scope to shape how our £23m endowment and our full range of activities are deployed in pursuit of our mission.

You will inherit a Foundation with a strong reputation, a distinctive voice and an impressive track record. We are proud of what has been achieved under Danielle's leadership and are looking for someone who will take the time to understand that history, the thinking and relationships that have shaped us, and what makes FPF distinctive. From there, we want you to bring a bold vision of your own for what comes next.

You will be intellectually curious, strategic and ambitious for our impact, able to engage with complex ideas while remaining focused on how they translate into meaningful change for people and communities. You will understand the power of partnership and be as comfortable enabling others to lead as you are leading from the front.

This is also an outward-facing role. We want FPF to be visible, connected and influential, building partnerships, influencing leaders and contributing to new thinking about how philanthropy, investment and capital can be used in pursuit of a fairer future.

You do not need to be an economist, nor do you need to come from a foundation. What matters is that you share our determination to challenge an economic system that creates and reinforces inequality, and bring the judgement, curiosity and leadership to help us imagine what could be different.

If that excites you, we would love to hear from you.

Caroline Taylor

Chair

About us

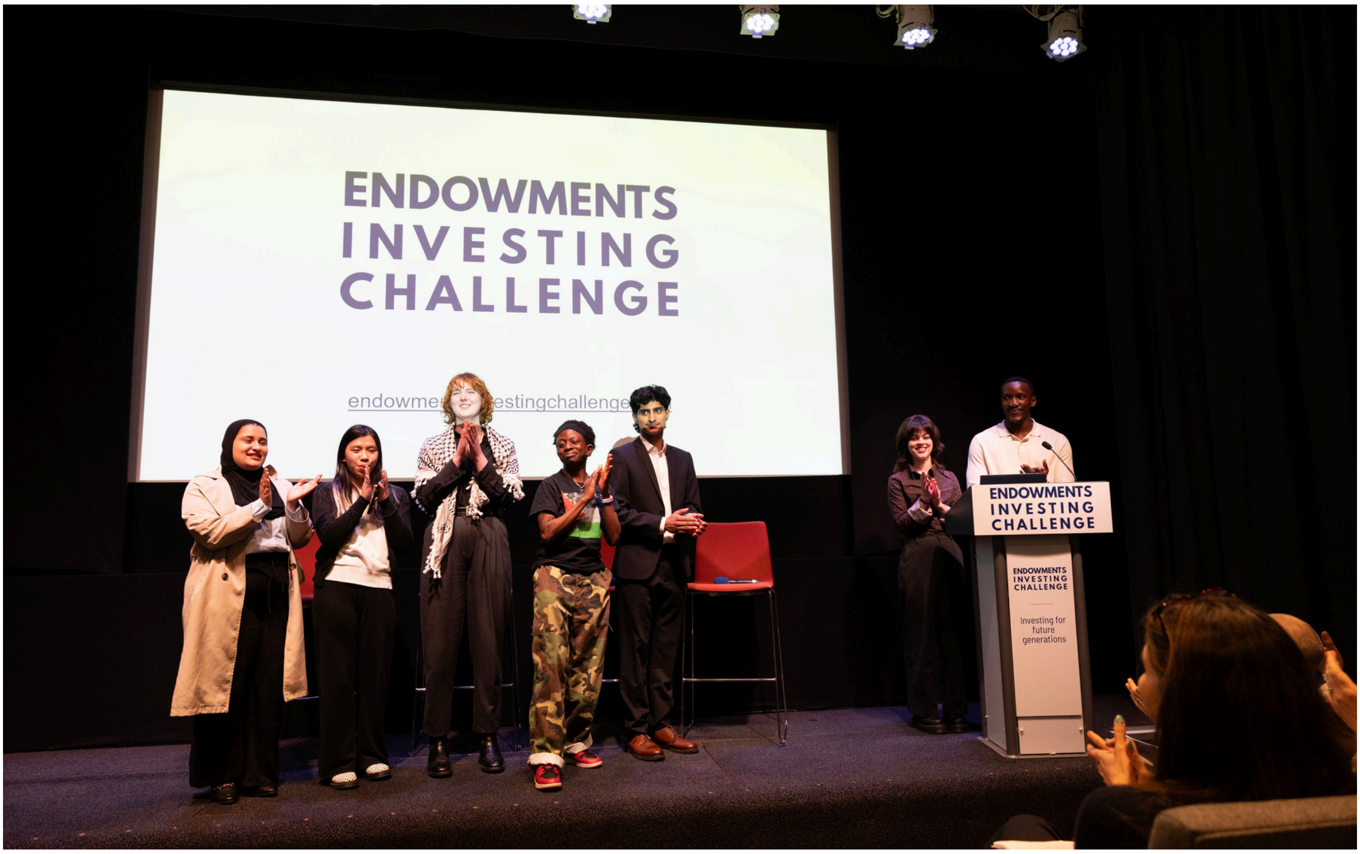
Friends Provident Foundation is an independent charity that makes grants and uses its endowment towards a fair and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for all.

The questions at the heart of our work are increasingly urgent. Economic and political systems shape who has access to wealth, security, opportunity and good health, with consequences that can play out across generations. We believe different futures are possible. By supporting new thinking, shifting power towards people and communities and influencing those with the ability to change systems, we want to help create them.

Since 2004, we've pioneered the creation of fair economy for a better world. Already, we've helped improve access to financial services for people who were once excluded and supported the development of resilient economic communities across the UK.

We're a catalyst for wider change, making an impact through continuous experimentation and shared learning. And we do all we can to embody the change we want to see. We invest in great social enterprises and use our money in line with our values.

Tomorrow, we'll continue to fund more new thinking, connect new ideas, invest our capital in line with our aims and values and create better systems so that in the future, the economy will serve both people and planet.



Ethical funds

Like many trusts, our focus reflects our heritage arising from our donor company being the creator of one of the first ethical funds in the UK.

Financial innovation

Our approach also reflects our tradition of financial innovation – we have had a social investment policy since 2006 and can commit up to 33% of our assets to high impact investing.

As a small trust, we have tried to ensure we used all of our resources in pursuit of social good. The rest of our funds have been invested in ethical bonds and equity funds, both UK and global – the success of which is reflected in the growth of our endowed funds from £20 million to £33 million over the past decade.

Quaker values

Our Quaker legacy and values have influenced our ethos – a belief in equality and justice, striving for fair dealing, truth and integrity, community and stewardship of the Earth underpins all we do.

Values Statement

Our values are central to how we seek to be and act in the world. This statement of values reflects time staff and trustees spent developing values that serve our mission and our vision for a fair and sustainable economy.

- We are bold; we take risks with our financial resources to maximise our impact. Our ambition is to speak truth to power.
- We are part of the systems we seek to change and aim to use our position and resources positively.
- We challenge ourselves and others to think and act in new and different ways.
- We are committed to fairness, equity and social justice and recognise our power and privilege

Equity and Social Justice

We believe that Equity, Diversity and Inclusion (EDI) is central to our efforts to build a fair economy. Our goal of transforming the economic system means that we are addressing a system underpinned by the marginalisation of black, LGBTQIA+ and disabled people; the undervaluing of the contributions of women; and the unequal hoarding of wealth.

EDI must also needs to be central to how we operate including staff and Trustee recruitment and management, investment management and engagement, grantmaking, communications and our relationships with the wider community.

Our EDI plan outlines where we are in the development of our EDI work strategically and in terms of our internal operations, grantmaking and wealth management.

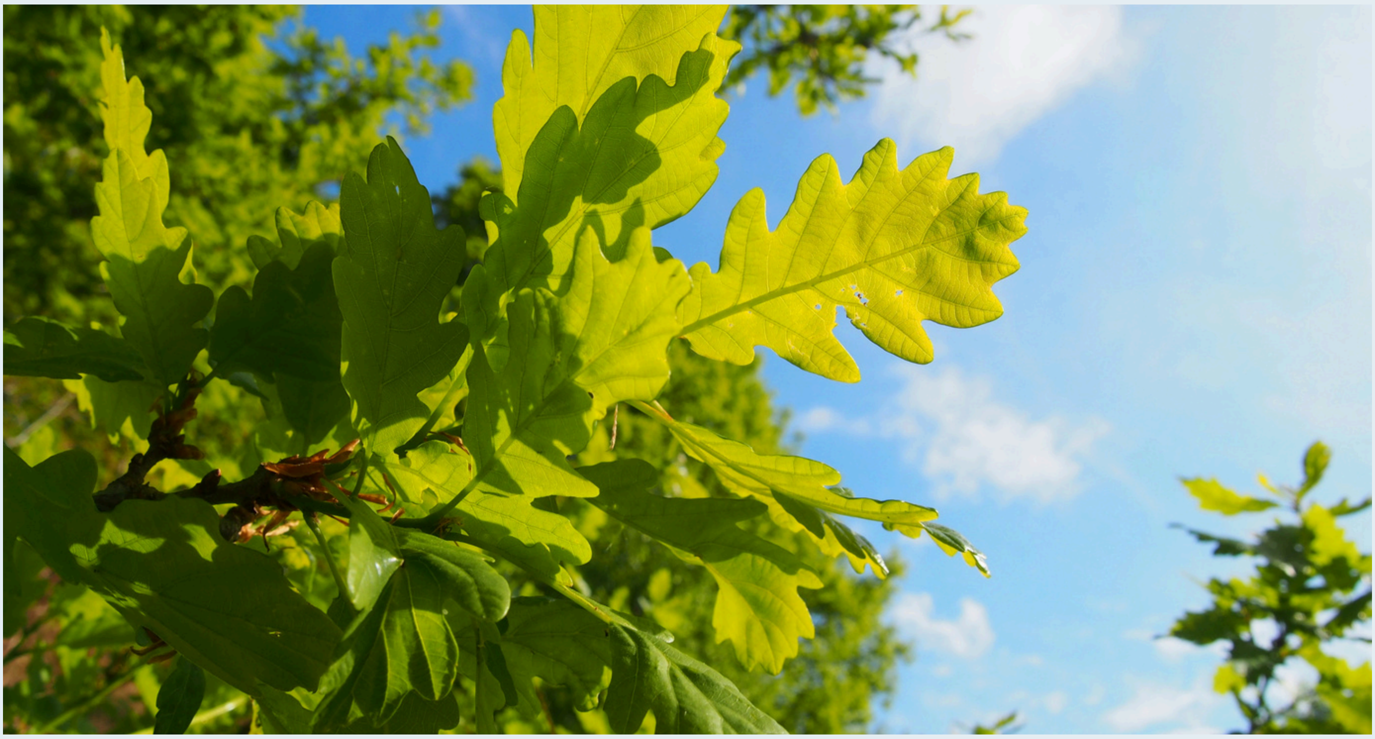
Find out more here

The role

Friends Provident Foundation has always been prepared to ask difficult questions about the economy, about who it serves and about how capital can be used differently. The next Chief Executive will inherit a Foundation with a strong track record, a distinctive voice and an opportunity to think boldly about what comes next.

There are significant possibilities ahead. We are looking to you to:

- Help us reimagine the future. Bring intellectual curiosity and strategic ambition to the question at the heart of our work: how can we help create an economy that works for people and planet, particularly in the face of deep and growing generational inequality?
- Build on a remarkable legacy and shape the next chapter. Take the time to understand what has made FPF influential and distinctive under Danielle Walker Palmour's leadership, respecting its history while developing a bold vision of your own for its future.
- Put power and partnership at the heart of impact. Build ambitious partnerships across philanthropy, civil society, policy, investment and beyond, recognising that achieving lasting change may sometimes mean sharing influence, ceding power or enabling others to lead.
- Use all of our assets for change. Think creatively about how our endowment, grantmaking, investment practice, relationships, convening power and voice can work together to achieve greater impact.
- Strengthen FPF's role as a leader and exemplar. Be willing to experiment, learn and model new approaches to grantmaking and investment, sharing what we learn and helping influence practice across the wider foundation and grantmaking community.
- Take FPF further out into the world. Build our visibility, relationships and influence with those shaping economic thinking and decision-making, making sure the ideas and experience of the people and communities most affected by economic inequality are part of that conversation.



This role is for you if…

✔️ You are fascinated by how economic and political systems shape people's lives and excited by the possibility of changing them.

✔️ You can combine big-picture, long-term thinking with the pragmatism to turn ambitious ideas into action.

✔️ You are intellectually curious and enjoy engaging with complex ideas, evidence and different perspectives.

✔️ You are ambitious for impact rather than organisational profile for its own sake, and are comfortable sharing or ceding power when that is the best way to achieve change.

✔️ You are a natural partnership-builder who enjoys bringing together people and organisations with different perspectives, resources and forms of influence.

✔️ You are interested in how philanthropy itself can change, and excited by the opportunity to model and champion different approaches to grantmaking, investment and the use of capital.

✔️ You can honour what has gone before without being constrained by it, taking time to listen and learn before shaping a bold vision for what comes next.

✔️ You want to lead a small, thoughtful and ambitious organisation that has the freedom to experiment, influence and make a contribution far beyond its size.

This role is not for you if…

✖️ You want to arrive with all the answers. We are looking for someone curious enough to listen and learn before deciding what comes next.

✖️ You believe organisational growth is the best measure of success. For us, the question is how FPF can achieve the greatest impact, including through the work and leadership of others.

✖️ You need to be the person or organisation at the centre of every partnership. We are serious about sharing power and sometimes stepping back when others are better placed to lead.

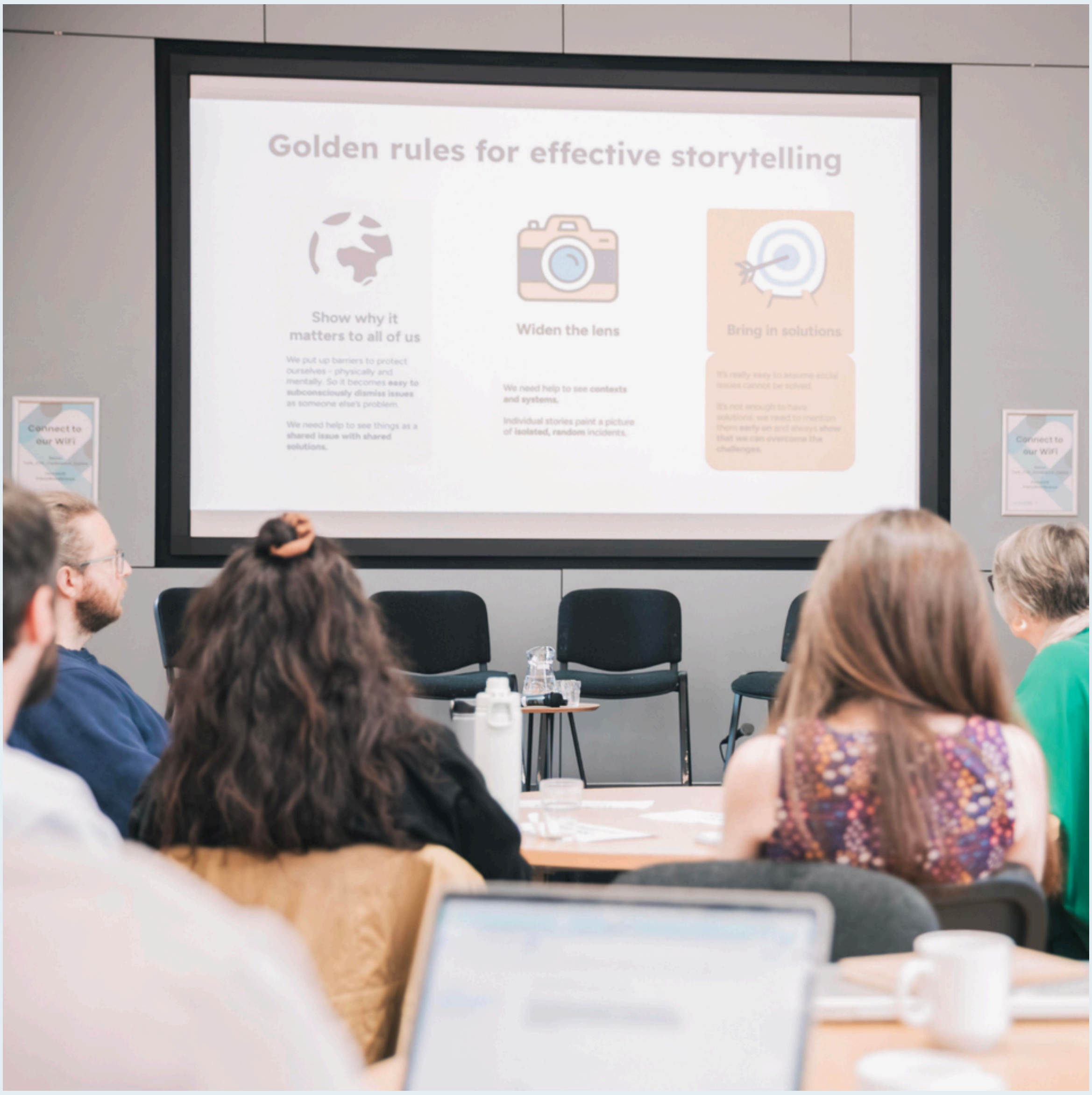
✖️ You are more comfortable protecting established ways of working than questioning them. FPF has a history of experimentation and we want our next Chief Executive to build on it.

✖️ You prefer clear-cut problems with straightforward answers. Our work sits within complex economic, social and political systems and requires comfort with ambiguity, different perspectives and long-term change.

✖️ You are looking primarily for an internally focused leadership role. We want FPF to be visible, connected and influential, with a Chief Executive who enjoys being out in the world.

Who you'll work with:

- The FPF Board of Trustees
- The FPF staff team, including the Head of Funding Strategy, Finance and Operations Manager, Communications Manager, Investment Engagement Manager and Social Investment Portfolio Manager
- Senior stakeholders and partners including grant partners, new economy organisations, impact investors, policymakers and peer funders



Job description

Job title: Chief Executive

Reports to: The CEO is responsible to the Board and is managed by the Foundation Chair.

The CEO leads an overall team of nine.

Direct reports:
- Head of Funding Strategy
- Finance and Operations Manager
- Communications Manager
- Investment Engagement Manager
- Social Investment Portfolio Manager

Role overview:
This is a unique role. If you are driven by the question of how we can create an economy that serves people and the planet, and you have an inclusive and collaborative leadership style, this role is for you.

The CEO will lead a respected foundation with an engaged Trustee Board, a committed staff team of nine and a £23m endowment. This is a role for someone who is rigorous and imaginative; who combines intellectual leadership with practical delivery; and who values partnership, integrity and long-term impact.

Main responsibilities:
Strategy & Innovation
- Work with Trustees, staff and partners to develop, articulate and deliver a new strategy that advances FPF’s mission.
- Ensure FPF remains at the forefront of thinking and practice in economic systems change, with a clear understanding of the role money, finance and investment can play in serving society.
- Lead the development of new ideas, approaches and strategic partnerships that strengthen FPF's role within the new economy movement and extend the impact we can achieve through collaboration with others.
- Oversee grant-making, investment and influence activity, ensuring all are aligned with FPF’s mission and translated into clear organisational plans and priorities.
- Identify and act on opportunities for learning, innovation and collaboration across the FPF, the wider foundation sector, and the organisations and movements FPF supports.
- Model and champion new approaches to grantmaking, investment and partnership, sharing FPF's learning and using our experience to influence practice across the wider foundation and grantmaking community.
- Drive continuous improvement in FPF’s systems and practices, ensuring the Foundation remains effective, accountable and fit for purpose as it enters its next strategic chapter.

Operations & Culture

- Steward the Foundation's financial, human and reputational resources with care, ensuring every asset is deployed in service of FPF's mission, values and commitment to economic justice.
- Oversee budgeting, financial planning and performance monitoring, ensuring the prudent, transparent and impactful deployment of the Foundation's capital.
- Ensure robust systems for risk management, internal control and assurance are in place and actively monitored, consistent with the Foundation's values of accountability and integrity.
- Provide thoughtful, values-led and low-ego leadership to a small, highly skilled and committed staff team working across York and London.
- Foster an inclusive, trusting and empowering organisational culture, listening to staff and partners, encouraging autonomy within clear parameters, and enabling people to work with confidence, purpose and accountability.

Governance & Influence

- Work effectively with Trustees, supporting strong governance, clear decision-making and a constructive relationship between Trustees and staff.
- Ensure Trustees are well-informed for effective oversight of strategy, finance, risk, investment, grant-making and organisational performance.
- Act as an external ambassador, representing FPF across philanthropy, civil society, policy and investment, in the UK and internationally.
- Extend FPF's reach and influence by building ambitious and trusted relationships with grant partners, new economy organisations, impact investors, policymakers, peer funders and others with the potential to advance our mission.
- Champion open, accountable and trust-based funding practice, role modelling approaches that share power with partners and communities and contributing actively to the broader movement for foundation sector reform.
- Where appropriate, develop external partnerships or income streams that extend the Foundation's capacity to act, consistent with its values and independence.

Person specification

Knowledge and experience

- Significant senior leadership experience within a charity, foundation, social investment organisation, government, or related mission-driven environment.
- Proven track record of developing and delivering organisational strategy in partnership with a Board.
- Experience overseeing grant-making, investment, partnership development, or funding programmes.
- Demonstrated experience in organisational governance, risk management, and policy development.
- Experience managing multi-disciplinary teams and supporting staff development.
- Experience representing an organisation externally.
- A strong track record of building strategic partnerships and coalitions to achieve impact beyond the reach or resources of any one organisation.
- Experience managing budgets, financial planning, and organisational resources.
- Experience developing new projects, initiatives, or income streams.

Skills and abilities

- Strong strategic thinking and the ability to translate vision into operational delivery.
- Excellent leadership and people management skills.
- Strong understanding of charity governance, compliance, and regulatory requirements.
- The intellectual curiosity and strategic judgement to engage confidently with complex economic, social and political questions, while remaining focused on their implications for people and communities.
- Ability to develop and implement effective policies and systems.
- Excellent communication skills, including public speaking, stakeholder engagement, and media handling.
- Ability to build and maintain relationships with funders, partners, policymakers, and grant partners.
- Strong financial literacy and ability to oversee budgets and investment-related work.
- High-level analytical and problem-solving skills.
- Ability to innovate and support innovation across organisational functions.

Styles and behaviours

- Commitment to the Foundation's mission of creating an economy that works for people and planet and its values, particularly equity and social justice.
- A low-ego approach to leadership and partnership, with the confidence to share influence, cede power and enable others to lead where this will create greater impact.
- Entrepreneurial mindset with creativity.
- High levels of integrity, professionalism, and commitment to transparency.
- Collaborative approach with the ability to work effectively with Trustees and staff.
- Resilient, adaptable, and comfortable managing complexity.
- Confident ambassador for the organisation with strong external presence.

Other requirements

- Willingness to work flexibly, including occasional travel and evening commitments.
- Capacity to work effectively with a staff team based in York and London.
- Understanding of the wider social, economic, and policy context affecting the Foundation's work.

Terms of appointment

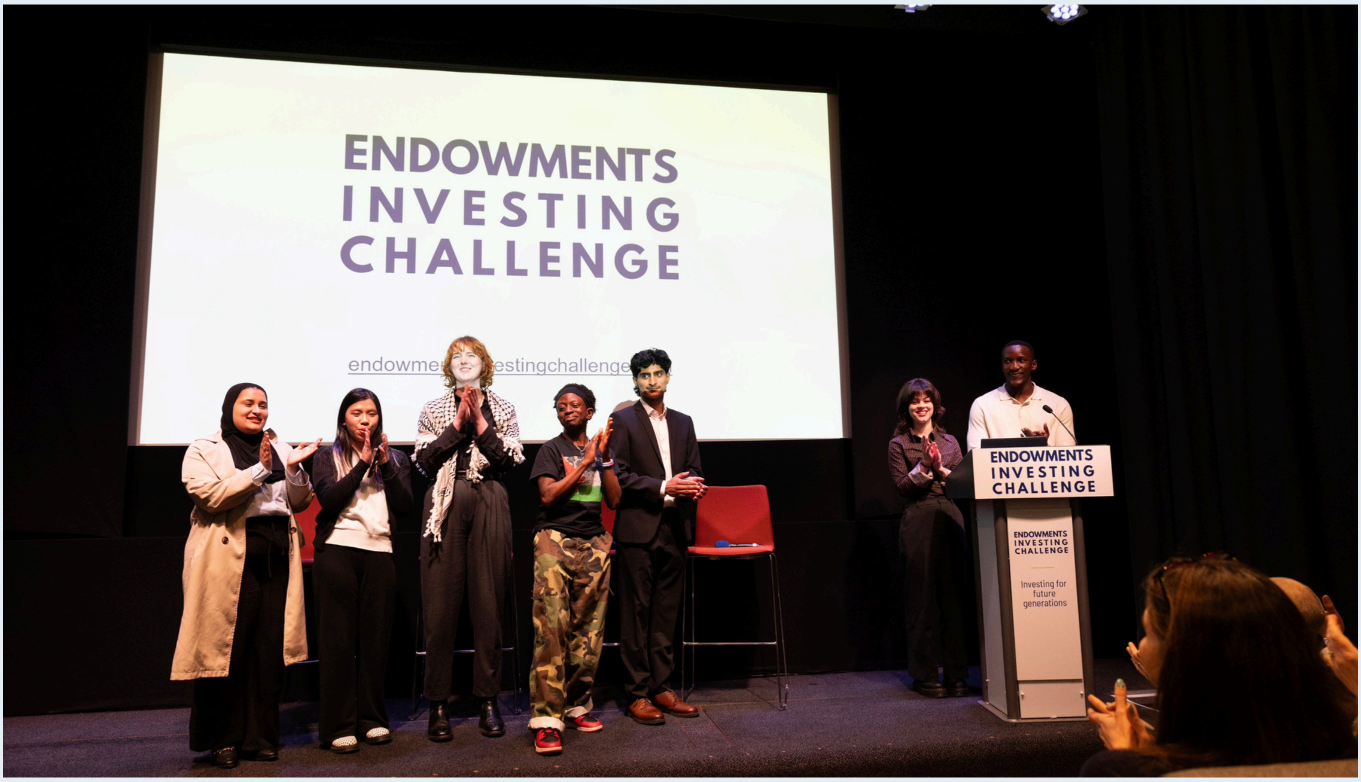
Salary
The salary for this role is £110,000 per annum on a full-time permanent basis.

Location
Hybrid working with a regular presence in York and frequent travel to London

Pension
The Foundation offers a defined contribution pension scheme, with an ethical option. The current contribution rates are: employer's, 13%, and employee's, 3%. There is a salary sacrifice scheme available.

Annual Leave
25 days, plus public holidays. In addition, the office closes for 3 days between Christmas and New Year.

Other benefits
- Life Assurance at 4x salary;
- Support with relocation costs;
- Employee Assistance Programme;
- Enhanced maternity/adoption/paternity leave and pay;
- Other family friendly leave for parents/carers/domestic emergencies etc;
- Generous sick leave provisions; and,
- Staff training allowance.



How to apply

We hope you will consider making an application. To make an application, please click here with the following prepared:

- Your CV (no more than three sides).
- A supporting statement (no more than two sides) that responds to the questions below:

1. Explain what draws you to this role and at this time. How will this enable you to lead Friends Provident Foundation with passion, authenticity and integrity?
2. Give us an example of a strategic partnership you have built that enabled greater impact than your organisation could have achieved alone. What role did you play, how did you work with others, and what did you learn about sharing influence or power in pursuit of a common goal?
3. Tell us how you have developed and nurtured a positive culture at work, particularly one where staff feel able to experiment, learn from failure and challenge established thinking.

We would also be grateful if you would complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

Closing date:	Monday 12th October 2026
Preliminary interviews:	w/c 26th October and early 2nd November 2026
Final Panel interviews:	Mid-late November 2026