



## **OLDER CITIZENS ADVOCACY YORK (OCAY)**

### **CHARITY DIRECTOR RECRUITMENT - CANDIDATES INFORMATION PACK**

#### **Opportunity to lead the development of a small but vital York charity in its 25th year**

Dear Applicant

Thank you very much for your interest in our vacancy. I hope you will find our information pack comprehensive and helpful.

Of course, this role is an absolutely critical one for us. We have taken big steps forward in the last few years and are proud of what we do:

- 520 people supported in the last year
- Financially sustainable charity with funding secured until 2029 and exciting funded projects and partnerships in the pipeline
- Highly regarded organisation with an active and visible local presence
- Established relationships with partners, funders and the public sector
- A talented, ambitious team
- Help people to navigate bureaucracy, financial hardship and communication barriers
- Achieved the prestigious 'Investing in Volunteering' quality mark

We now enter an exciting new phase, during which we want to find new ways to support our clients as well as to build on the strong platform that is in place. Our Charity Director will have the challenge of taking us to the next stage of our development with exciting new projects and partnerships, working with OCAY staff, volunteers, and trustees to build a continuously evolving Charity which is both unique and exceptional. The mood of the Charity as we make this appointment is to be confident, but absolutely not complacent!

I hope you enjoy reading the information pack and finding out more about the role.

With best wishes

**Gillian Caldicott**

**Chair of Trustees**



**OCAY believes in a world where every older citizen is able to access the help and support they need.**

**OCAY is dedicated to helping people have their voice heard, linking them to the right support for their needs.**

**Advocacy simply means supporting people to speak up for themselves when there is something they want to do or say.**

**We are accessible, friendly, and honest in everything we do.**

## **Our Story**

OCAY has offered an independent, free, and confidential advocacy service to those over the age of fifty in the City of York area for nearly 25 years. During that time OCAY has grown in reach and success.

***"I have always been passionate about the way older people are treated in our society. Often, they are portrayed as a burden, but they make a valuable contribution to our world and should be treated with dignity and respect." (Trustee profile)***

OCAY supports clients with a diverse range of issues. We help people with benefits, including information, form-filling, and assessments, also with a wide range of issues including consumer complaints, family, housing, and employment issues. Last year OCAY supported over 530 clients to resolve a range of issues important to their lives. Maximising clients' income is an important aspect of our work, but we support older people with whatever matters to them. Click here to read our [2023 AGM report](#)

**'I definitely needed help during the telephone assessment and my advocate was very, very helpful.' (Client feedback)**

**'Without them I wouldn't have gone to the Tribunal.' (Client feedback)**

**'Knowing I can ask for help has been really helpful and getting the help has given me emotional support just when I needed it.' (Client feedback)**

***"I appreciate All your help and the Advocacy without you All I wouldn't be here." (Client feedback)***

OCAY currently has 12 active Volunteer Advocates. Our volunteers are central to our service. We provide in depth training and professional support for all our advocates. Volunteer advocates come from a range of backgrounds, and they are all passionate about supporting older people to have their voice heard. Friends of OCAY provide valuable support such as delivering leaflets, fund raising and outreach.

OCAY is an effective and well-regarded charity. In 2021 OCAY was successful in securing four-year funding from the National Lottery Reaching Communities fund and proudly again in 2026 for three years, and we have been recognised by awards and accreditations, like the Charity Governance Award, the local 'Volunteering Quality Mark' awarded by York CVS in Nov 2025 and reaccreditation for the Investing in Volunteers Award.

**'... judges noted that trustees have been very effective in using the learning emerging from their work with clients to better understand clients' unmet needs and have shaped the organisational strategic priorities and fundraising efforts accordingly.' (Feedback from Governance Awards)**

At OCAY we are always striving to be the best we can be and to use our expertise to help more older people find their voice. Our outreach work and work with partners seeks to ensure that people in all areas and from all backgrounds know we are there to assist them. And we are always looking for new opportunities to help, such as working with local prisons and with armed forces veterans.

We believe it is important to evaluate the effectiveness of our work, so we survey volunteers and clients regularly and use their feedback to inform our plans. Here is an example survey [report](#).

**'They are amazing, we all have a great relationship with them, you probably have lots of volunteers who say this, but I do feel like I am part of a family and I'll be here as long as I can be' (Volunteer speaking about staff in IiV assessor report)**

Our annual budget is in the region of £120k. OCAY is funded primarily by the National Lottery as well as several smaller grants, donations, and our own successful fundraising.

Despite the financial challenges facing charities, OCAY is in a strong financial position – having recently secured 3 year funding from the National Lottery Community Fund, as well as a funding agreement with York City Council and a two year partnership agreement with local charity MySight, funded by York community fund. Securing additional grant funding, particularly in years 2 and 3 of the National Lottery grant, will remain an important priority for the Charity Director, but we are in a strong position to develop the charity as part of these partnerships.

We are based at the Priory Street Centre, a community building that is owned by York CVS and accommodates other Third Sector organizations such as York CVS, Healthwatch York and the Welfare Benefits Unit.

*'Clients come to OCAY in a variety of ways - some are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. We post leaflets through doors and advertisements in local magazines and papers to ensure that everybody is aware of our service and know they can contact us, whatever the issue.'*

You can find out more about OCAY at <https://oldercitizensadvocacyork.org.uk/>

## Join our team

OCAY is governed by a board of trustees and has three members of staff:

**The Charity Director** leads on the strategic development of OCAY as well as the day-to-day management, promotion, partnership development, volunteer development and the evaluation of the service. The Director is responsible for grant applications and accreditations. [minimum 30 hours a week]

**Advocate** undertakes an individual caseload of complex cases and gives support to volunteer advocates, carries out initial meetings with all clients and supports OCAY's development work. [Part time - 20 hours a week over 3 days]

**Finance & Administration Coordinator** is the first line of contact for clients, volunteers, and external organisations, provides the day to day administrative, financial, and business support for OCAY. [25 hours a week over five days]

## About You

### ***Is this the right role for you?***

You will enjoy being part of a small team and have experience of managing others, either in a work or community setting. You will be adaptable and able to get the best out of people to get the job done. You will enjoy the opportunity to work with and support a highly committed and skilled group of trained volunteers.

You will have experience of developing strategies and plans in a collegial and team-based way, and of measuring the impact of those plans.

You will be curious, full of ideas and enjoy new challenges, but at the same time, practical – a doer with a track record of successful delivery.

To be a success in this role you'll need to get along with a wide range of people and be able to get your message across in a friendly but persuasive way.

Crucially, you will easily identify with OCAY's mission to support older people and understand the challenges our clients can face.

## **Terms and conditions of employment**

This is a full-time role (37 hours per week), but the Trustees will consider applicants who want to work a minimum of 30 hours each week. We are open to jobshare applications, particularly from established jobshare partnerships.

You would be expected to work in the OCAY office at the Priory Street Centre for at least two days each week and your role will also involve visiting various locations across York.

The full-time salary range is £40,000 to £45,000 for 37 hours per week. New starters will normally start on the minimum of the scale. Salaries are reviewed annually to ensure market competitiveness but there is no expectation that the rates will increase each year.

This is a hybrid role with home working and an expectation of at least 2-3 days a week in our office at the Priory Street Centre, York.

The successful candidate will need to complete a six-month probationary period.

There will be opportunities for learning and personal development throughout your time with OCAY.

## How to apply

We hope you are excited by the opportunity to join OCAY. You will find a full job description and a person specification for the role of Charity Manager on the following pages.

Please email your CV along with a supporting statement about how you meet the essential person spec to:

- OCAY Chair of Trustees Gillian Caldicott [Gillian.caldicott65@live.co.uk](mailto:Gillian.caldicott65@live.co.uk)
- Current Charity Director Amy Faulkner-Gadd [amy@ocay.org.uk](mailto:amy@ocay.org.uk)

We welcome informal conversations about the role, so please get in touch.

Deadline is **Friday 30 January 2026**.

## What happens next?

Informal chat with the current Charity Director and/or Chair during January.

Interviews will take place week commencing **2 February 2026**. Part 1 will be with the charity's staff and part 2 with a panel of 3 trustees.

The Board expect to make a decision within 2 working days of the final interview.

## OLDER CITIZENS ADVOCACY YORK

### JOB DESCRIPTION

<b>Job Title:</b>	Charity Director
<b>Responsible to:</b>	Management Committee through Chair of Trustees
<b>Responsible for:</b>	Finance and Admin Coordinator  Advocate  Volunteers
<b>Key relationships:</b>	Staff; Volunteers; Clients; Chair, Treasurer and Trustee Board; Local Agencies and Professionals; Funders and other Stakeholders
<b>Hours:</b>	Minimum of 30 hours per week
<b>Location:</b>	York, hybrid
<b>Funding:</b>	This is a permanent position that is funded from a variety of sources.

#### **Job summary:**

OCAY is an award winning, niche charity with big ambitions and a proven history of success in supporting older individuals (age 50+) in the York area, through a network of trained and committed volunteer advocates.

We take immense pride in the positive impact we create, as evidenced by 100% of surveyed clients expressing their intent to return to OCAY for assistance in the future if needed and the majority indicating that OCAY's support has had a positive effect on their overall well-being.

Our current director is taking the next step in her career and we are commencing the search for a new director who will take the organisation on the next stage of its journey, proving clear strategic direction as agreed with the Trustees, and establishing practical priorities and signposts. The Director will manage, directly or indirectly, OCAY's small staffing team and resources, and will organise a platform for sensible future growth based on financial sustainability and a diversified funding base.

The Director will develop existing Key Performance Indicators whilst establishing a new range of measures through which progress can be monitored and will work flexibly to respond to changing opportunities and challenges.

**Main duties and responsibilities:**

1. Be at the heart of the charity's strategic development over the next 3 years, driving exciting initiatives and growth.
2. Lead and co-ordinate all aspects of OCAY's services, ensuring a high quality of provision for its clients, and maintaining a continuous improvement focus.
3. Develop and broaden excellent relationships and work collaboratively with volunteers, funders, partners and Trustees.
4. Lead the expansion of our pool of volunteers and maintain excellent relationships with OCAY's volunteers, ensuring they are valued and developed in an inclusive and respectful way.
5. Build and maintain a sustainable financial basis for OCAY's future development. Lead on financial management, including the management of day-to-day finances. Build a financial and funding management plan. Liaise with the Treasurer to prepare management accounts and annual financial statements.
6. Take the lead in writing and submitting fund raising bids and writing other submissions – e.g. maintaining the Charity's volunteering quality mark.
7. Ensure procedures and policies are in place to ensure the Charity operates efficiently and in accordance with good management practice. Ensure administrative systems operate efficiently and that unnecessary bureaucracy is minimised.
8. Ensure that OCAY's staff are deployed and developed in accordance with best employment practice and that appropriate and supportive performance management frameworks are in operation.
9. Ensure that all OCAY's resources are used effectively, and in accordance with agreed strategic priorities.
10. Develop the suite of KPIs through which progress can be monitored and reported on.
11. Co-ordinate with other staff an effective prioritised programme of outreach activities to improve the Charity's profile and to raise awareness of its services. Promote OCAY generally in the City, extending our networking and partnership activities.
12. Work in close partnership with the Chair, staff, trustees and volunteers over the development, maintenance, and implementation of the strategic and operational plans for OCAY, including budget setting and monitoring and risk management. Contribute effectively to Trustee Board meetings in a collegial and professional way.
13. Manage the day-to-day administration of governance requirements e.g. communication with the Charity Commission.
14. Maintain and build excellent working relationships with funders and work collaboratively in partnership with other appropriate organisations in the City.

15. Undertake any other reasonable duties as required, commensurate with the post.

#### **OCAY Charity Director – Person Specification**

***The following are the main skills and knowledge we are looking for in the role. However, we don't expect candidates to necessarily have all the requirements and so if you have a demonstrable ability to learn, and don't have experience in all areas, we would welcome your application, including details of how you've learned and developed in previous roles.***

<b>Leadership and Management</b>
Credible and flexible leader and manager, with experience gained either in the third sector or in an equivalent/comparable area of work
Effective written and verbal communications skills
Experience of leading a small staff team effectively, and skills in people management and development
<b>Strategy and Service Delivery</b>
Demonstrated understanding of, and a passion for, providing support and advocacy for older people in an empathetic and respectful way
Skills in balancing a mix of strategic and operational work, setting clear priorities and being agile and responsive to changing pressures
Commitment to working supportively and empathetically with volunteers
Experience of developing strategies and plans in a collegial and team-based way, and of measuring the impact of those plans
<b>Skills and abilities</b>
Excellent interpersonal, communications and influencing skills to facilitate both effective working relationships with staff and volunteers, and to present and promote the charity externally with credibility
Demonstrated ability to promote the principles of diversity and equal opportunities in people management, service delivery and development
Proven experience in fundraising, grants, partnerships, and donor relations
Ability to work under own supervision and to use initiative in setting and continuously re-assessing priorities to achieve deadlines and exploit opportunities
Proven track record of achieving results and solving problems using innovation and flexibility
Evidence of ability to plan and identify opportunities in a progressive, forward thinking, and open-minded way

Experience of setting budgets and managing finances in line with agreed budgets and experience of managing funds, and ability to ensure financial sustainability and accountability
Broad general IT skills
Strong networking skills across public, private, and voluntary sectors

***The following are also desirable skills and qualities, though some can be developed once in post, and we will therefore interpret them flexibly.***

Experience of managing an effective advocacy or advice service, ideally in a setting that provides services for older people.
Experience and skills in deploying a flexible range of fundraising methods and initiatives, including grant submissions
Familiarity with the local context, including main stakeholders, networks, and challenges across York and nearby areas.
Demonstrated skills in working effectively with a volunteer Trustee Board, or an equivalent Board or Management Committee
Proven track record of developing networks and partnerships and nurturing key relationships with demonstrable positive outcomes
Experience of successful project management, including report writing, monitoring systems and data analysis
Sound understanding of charity law, governance, and regulatory requirements

**January 2026**