

Philanthropy & Investment Lead



**LLOYDS BANK
FOUNDATION**
ENGLAND & WALES



Welcome!

Thank you for your interest in joining us as our **Philanthropy & Investment Lead**.

This is a genuinely exciting opportunity to be part of an independent charitable foundation with 40 years of impact. You'll be joining a driven and values-led team that is committed to connecting and catalysing community-led change. We're bold, relational, inclusive and can-do in everything we do. We're not afraid to innovate, take risks, and push for change that breaks down barriers and helps communities thrive.

As Philanthropy & Investment Lead, you will play a key role in shaping and delivering the Foundation's Philanthropy Pilot. Working closely with Lloyds Banking Group and colleagues across the Foundation, you will lead the early development of a digital giving service through the Lloyds Banking app while driving delivery of this exciting new initiative.

If you share our vision — that everyone in England and Wales should **be in a good place** — and you're ready to play your part, we'd love to hear from you.



One Roof Leicester



About Us

Lloyds Bank Foundation for England and Wales is an independent charitable foundation, backed by Lloyds Banking Group and the people within it. We want everyone to be in a good place - personally, in a home that's a good place to live, and in a community that's a good place to belong.

We back people and communities across England and Wales, to make that happen, because when you back brilliant people, brilliant things happen. Our communities are full of ambitious, energetic and determined people stepping up to make their neighbours' lives better and their communities grow stronger. Day in, day out.

We play our role by connecting and catalysing community-led change, providing the money, time, tools and connections that build organisations' capacity and capability, to make people's lives better and their communities stronger.

You can find out more about us on [our website](#).



Voices in Exile



**LLOYDS BANK
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Our Values

Our values are more than words on piece of paper or stuck to the wall. Our values are how we live as we achieve our mission. They're how we work with our colleagues, our partners, and communities. Our values are at the heart of our organisation.

Bold

We're ambitious problem solvers.

Inclusive

We listen and learn from others.

Relational

We build relationships to achieve changes in society

Can do

We're driven and make change happen.



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Our Impact

We've had 40 years of impact that lasts.

We've helped household name charities like Childline and Changing Faces get off the ground. As a frontrunner in organisational development and capacity building, our expert investments in charities have helped them turbocharge their growth, create new jobs, and become more resilient. And in our priority communities, we've improve how things work for people and places, so everyone can flourish.

Nearly

£1 billion

invested in communities

45,000

grants to community
organisations

1,000s

of colleagues supported
to give time and money

Nearly

1,700

jobs created over 10years

“

When I was referred to Youth Shedz, my mental health was awful and I wasn't leaving the house. I was really struggling with life. **I just wasn't in a good place.**

Having that space at Youth Shedz where I could just be myself and learn who I was, and what was really important to me, was so helpful. And then I started volunteering, and then I got offered a job and now I've been working here for three years.

Sonia, Assistant Youth Shedz Coordinator



Our Team

Lloyds Bank Foundation is an organisation with a bold vision, that's ready to scale.

Hand in hand with Lloyds Banking Group Group, and with partners new and old, we're setting out some ambitious goals, and each one of our four directorates plays a distinct role in making those goals a reality, so everyone in England and Wales can be in a good place.

Our Community-led Change Directorate is the delivery engine where strategy becomes action, with local teams embedded across England and Wales building genuine relationships with the people and places we support. Our Strategy, Impact and Innovation Directorate drives our national strategy, and connects what we learn on the ground to the systems change we pursue at a national level. Underpinning all of this are our Philanthropy & Investment Directorate and Operations teams, whose work ensures the organisation is sustainable, well-run and that our values are reflected in how we operate internally as much as externally.

We are governed by an impressive Board of Trustees who bring a wide range of skills and experience. We're a team of people who believe in what they do, support one another, and hold themselves to high standards.

You can meet our team and learn more about them [here](#).

Working with Us

Joining Lloyds Bank Foundation means becoming part of a team where your work directly contributes to making England and Wales a good place, whatever your role. The Foundation can offer you a rewarding career that supports your professional development alongside supporting community-led organisations, and creating a positive impact in society.

Everyone should be in a good place, and that's also true when it comes to working with us. We believe that we are at our best when we can be ourselves – that's why we are committed to creating an inclusive and accessible working environment for everyone.

90%

of our team are supportive of the direction the Foundation is heading.

We're a Disability Confident employer, a Living Wage Employer, and we work hard to make sure every member of our team feels valued, supported and able to thrive. We offer a comprehensive benefits package, and a culture built on our values. We welcome people of all backgrounds, particularly those from communities that are underrepresented in our sector. Whoever you are and wherever you're coming from, we want you to **be in a good place** when working with us.



Since joining the Foundation as a 2027 Associate, the opportunity that was presented to me to get a real insight into the UK voluntary sector in general and grant making in particular was remarkable.

I am so proud to be a member of the team, and play my part in the drive to better support and develop the capacity of small charities to address the issue of social injustice. **I hope to further progress my career in the sector, and I feel I am at the right place.**

Nebiat Tefera Abebe, Funding and Compliance Officer



Staff Benefits

We want everyone who works at Lloyds Bank Foundation to be in a good place, and that means making sure you have everything you need to thrive at work. Here's some of what we offer:

Generous annual leave of 33 to 38 days (inc. statutory)

Winter closure (additional 2-3 days)

Pension scheme with up to 13% employer contribution

Private medical insurance covering dental, eyecare and mental health

Two paid volunteering days per year

Employee family leave entitlement

Employee Assistance Programme

You can find more information about working with us and our comprehensive benefits package [here](#)

Philanthropy & Investment Directorate

The Philanthropy & Investment Directorate is a new directorate created to help deliver the Foundation's 2026-2035 strategy by unlocking significantly more money, partnerships and community benefit across England and Wales. Bringing together the Foundation's work on philanthropy, giving, social investment and income generation, the team ensure these activities remain firmly connected to community-led change and the Foundation's mission.

The directorate will work closely with Lloyds Banking Group and other partners to create new ways for people to contribute money, time and expertise, including exploring digital giving and wider community engagement opportunities. It will also shape the Foundation's future approach to social investment, identifying opportunities to unlock capital, lending and other resources that can support charities and communities to thrive.

Ultimately, the directorate exists to grow the scale of resources available to communities, enabling more people to be in a good place personally, live in a good place, and belong to a good place.

WODIN (Women and Digital Inclusion)

About the role

Role: Philanthropy & Investment Lead

Starting Salary: £63,533

Contract: Full-time, permanent contract

Location: Two days a week in the London office; occasional work from Lloyds Bank office. Travel to clients and charities is expected.

Line Manager: Director of Philanthropy & Investment

Direct Reports: None

Role purpose

This is a rare opportunity to help build something new.

We are looking for a Philanthropy & Investment Lead to lead the Foundation's Philanthropy Pilot and help shape the first stages of a digital giving service through the Lloyds Bank app. You will take a leading role in turning an ambitious idea into a successful and scalable proposition, working across the Foundation, Lloyds Banking Group, clients, charities and partners to bring people together around a shared vision.

Reporting to the Director of Philanthropy & Investment and sitting on the Foundation's Leadership Team, you will provide the day-to-day leadership required to make the Pilot a success. You will coordinate activity across the organisation, develop strong external partnerships, oversee commissioned support, and ensure the work is delivered effectively, safely and with clear learning and impact. You'll also help establish the Foundation as a trusted partner in philanthropy, developing relationships with clients and their advisers, identifying opportunities to increase giving, and representing the Foundation externally within philanthropy networks and partnerships.

This role would suit someone who enjoys creating momentum, navigating complexity and uncertainty, and turning ambitious ideas into practical outcomes.

Key Responsibilities

Leading the Philanthropy Pilot

- Make the Foundation's Philanthropy Pilot a reality, providing the day-to-day leadership to make the project a success, and set it up to scale.
- Work across the Foundation to coordinate and drive forwards the activity required for the Pilot, including with the Operations team to manage risk and develop the relevant agreements and contracts with clients, partners, sister foundations, and the Bank; with the Governance lead to ensure appropriate Board oversight and develop appropriate policies; with the Funding and Compliance team to develop the required relationship management systems; with the Impact team to develop engaging reporting and embed evaluation of the Pilot; with the Communications team to develop effective materials; and with the Community-Led Change directorate to develop propositions.
- Conclude the Pilot effectively, with learnings and detailed, budgeted recommendations for how the Pilot might be scaled, continued or closed by mid 2027.

Digital giving through the LBG app

- Partner with the Consumer Relationships team at Lloyds Banking Group to kick off the design of a minimum viable product to test the potential for digital giving and community action through the Lloyds Bank app.

Compliance and fundraising standards

- Lead the adoption and rollout of new internal policies aligned to the Fundraising Regulator's Code of Best Practice, ensuring the Foundation's income generation meets the highest standards — including due diligence relating to Special Interest People (SIPs) and Politically Exposed People (PEPs).

Client and partnership relationships

- Manage relationships with partner organisations, including contractors, Cazenove Capital, Lloyds Banking Group, sister foundations, and colleagues in the regions.
- Liaise with clients and their offices to provide giving propositions, engagement opportunities, deepen relationships, and ultimately unlock greater giving.
- Represent the Foundation in philanthropy forums, absorbing learning, exploring new opportunities for partnerships, and — in time — providing thought leadership.

Responsibilities (continued...)

Communications and internal engagement

- Inspire and energise the whole of the Foundation — including regional staff — and Lloyds Banking Group colleagues where appropriate, with regular internal communications sharing the progress and learnings from the Pilot.
- Establish a sophisticated external communications approach across the Pilot partnership, to inspire more people to get involved and act as a demonstrator of our transformation as part of our new strategy.

Ways of Working and Contribution

- Act as an ambassador for the Foundation, representing our work and values with credibility and professionalism internally and externally.
- Live and champion our values, being bold, inclusive, relational and can-do in how you approach your work and relationships.
- Collaborate across teams and directorates, contributing to a joined-up and supportive organisational culture.
- Contribute to organisational priorities and activities, including all-Foundation events, cross-team projects and key initiatives.
- Engage in learning and development, taking responsibility for your own growth and contributing to a culture of continuous improvement.
- Work flexibly to meet the needs of the role, including occasional travel, out-of-hours activity and overnight stays where required.

Key Relationships

- Internal: Leadership Team; Governance Lead; Operations; Communications Team; Funding and Compliance Team; Regional Teams; Wider Foundation colleagues
- External: Lloyds Banking Group; Philanthropy sector forums

What Success Looks Like

- The Foundation's relationships with Lloyds Banking Group and other strategic partners are well coordinated and effectively managed.
- The Philanthropy Pilot is successfully delivered, with clear outcomes, learning and recommendations to inform future decision-making.
- A minimum viable product has been developed to test the potential for digital giving and community action through the Lloyds Bank app.

This is not an exhaustive list and other duties may be reasonably required.

About you

Experience & Qualifications

- Fundraising or philanthropy management experience.
- Experience in the development, management and control of budgets and financial plans.
- Experience commissioning work, managing contracts and freelancers.

Knowledge & Skills

- Comprehensive project design and project management skills, with the ability to listen to the needs of diverse stakeholders, to prioritise, and to negotiate competing demands to deliver a project through to completion in a set timeframe.
- Excellent leadership skills, with the ability to bring people together to achieve a shared vision.
- Brilliant relationship management skills, with the ability to navigate, find consensus and encourage progress among corporate, philanthropic, charity and internal audiences.
- An excellent communicator, who can inspire internal audiences and represent the Foundation to external audiences as a compelling spokesperson.
- Ability and credibility to operate effectively with Boards and Executive Leadership Teams.

Values & Attitudes

- A self-starter, who will take full ownership over driving forwards progress at pace, solve problems as they occur, and actively seek out and implement new opportunities.
- A creative, innovative approach.
- Ability to navigate the uncertainty inherent in managing a pilot.
- Ability to work alongside colleagues as part of a team, sharing ideas, and problem solving collectively.
- A demonstrable commitment to placing equity, diversity and inclusion at the very heart of your work.

Recruitment process

We're committed to a recruitment process that is fair, inclusive and structured, giving you a clear sense of what to expect at every stage. The process usually follows the steps outlined below, and if you make a successful application, we'll send you a more detailed breakdown ahead of time. This will usually include themes for interview questions in advance.

Step 1: Application

Start by completing an application form using our recruitment portal (Hireful). The form will ask two or three tailored questions, designed to help you demonstrate your experience, motivation and alignment with our values. You'll also be asked to upload your most recent CV.

Step 2: Interview

We have a two-stage process. First round interviews are usually held online, with second-round interviews taking place in person. This gives us the opportunity to explore your experience, motivations and suitability for the role in more detail, as well as what drives you and how you connect with our mission. To help you prepare, we'll share the themes and topics with you in advance.

It may also include a task, presentation or scenario-based questions to explore your suitability in more depth. You'll have the opportunity to meet key members of the team and get a real feel for our culture and ways of working.

Using AI in the Application Process

We recognise that some candidates use AI tools such as ChatGPT to help write their applications. We understand. Applications take time, and it can be hard to know where to start. However, there are some common pitfalls that can affect the strength of your application. We've put together some tips to help you navigate this to submit an outstanding application. [Read them here](#). For full transparency, we may also use AI to help rank applications. We always do quality checks to test AI outputs and all of our final decisions are made by human beings. We use the Hireful platform's AI function, which you can read more about [AI shortlisting](#).

A note on Imposter Syndrome

Imposter Syndrome is the feeling that you don't truly deserve your success, or that you're not as capable as others perceive you to be. It can be particularly present when applying for a new role. It's long been recognised as disproportionately affecting people from marginalised groups. If this resonates with you, please know that we actively want to hear from people of all backgrounds.

Your Application

Selection Timeline

Closing Date: Monday 7 September 2026, 9.00am

First Interviews: Tuesday 15 September 2026 (online)

Second Interviews: Wednesday 23 September 2026 (in person)

How to Apply

To apply, please complete our [online application form](#). As part of the application you will be asked to complete short answers to the following four questions. You may find it helpful to prepare your answers in advance and paste them into the recruitment portal when you are ready to submit:

- Please describe a complex project or initiative that you have led from concept through to delivery. What was the objective, who were the key stakeholders, what challenges arose, and how did you ensure the project achieved its intended outcomes? (300 words max.)
- This role requires working across corporate, philanthropic, charity and internal stakeholders, often with differing priorities. Please provide an example of a time when you brought together people with competing perspectives to achieve a shared objective. What did you do and what was the outcome? (300 words max.)
- The Philanthropy Pilot will involve testing new approaches where the route to success is not always clear. Please describe a situation where you had to lead work in an uncertain or evolving environment. How did you manage risk, adapt your approach, and identify opportunities along the way? (300 words max.)
- Please tell us about a time when you successfully built or strengthened a significant external partnership, client relationship, fundraising relationship, or strategic collaboration. What was your role, how did you establish credibility, and what impact did the relationship deliver? (300 words max.)

If you have any queries about the application process, please email LRecruitmentMailbox@lloydsbankfoundation.org.uk



lloydsbankfoundation.org.uk

 [/lloydsbankfoundation](https://www.linkedin.com/company/lloydsbankfoundation)

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