

THINK Recruitment



ROYAL BRITISH LEGION

Candidate Pack: Head of Trusts and Philanthropy

Location: Hybrid – HQ in London, office based 2 days per week

Salary: £54,840 - £60,492 per annum (inc London weighting)

Closing date:





Welcome from Holly Seabrook, Head of Supporter Development at the Royal British Legion

Thanks for your interest in this role and working for RBL.

The Royal British Legion holds a special place in the hearts and minds of generations of people in society. As the largest military charity in the UK and home of the Poppy Appeal we have provided support to members of the Armed Forces community for over 100 years.

Today is no different. The needs of veterans, young and old, serving personal and their families are growing.

To support them we must raise awareness and secure donations, and that is where you could come in, playing a key role in the leadership and management of a newly formed Supporter Development team, focusing on stewarding and growing a high value programme. Core to our revamped Supporter Development team is bringing in this post.

The post holder will lead and launch our ambitious Mid-Value programme and revitalize our trust income stream whilst maintaining relationships with our existing high value donor base across major giving. As a vital part of the Supporter Development Management team this role will shape the experience that all donors have with the Royal British Legion, ensuring it is a positive one throughout their lifetime, and that your donors feel part of our 'One Legion'.

This is an extraordinary opportunity to join the leading Armed Forces charity and help to deliver evolving donor relationship programmes that ensure strong relationships today and also provide longer term opportunities to help fund our much-needed services in the years ahead.

I am excited about our work and our plans, as there is vast potential across all of high value giving and philanthropy. We just need the right person to help us realise that potential. If you'd like to hear more from me about why I joined RBL and why I think it is a fantastic place to work, I shared my story [here](#).

I'd be delighted to speak with you informally about the role - just let THINK Recruitment know you'd value a chat.

Thank you, we hope you join us at the Royal British Legion,

Holly



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Our vision: Philanthropy

RBL has launched a new fundraising strategy which focuses on their 'Three Giants': Poppy Appeal, Individual Giving and Legacies.

Trusts and major giving at RBL has huge potential; the trusts portfolio is large and varied, with support from some of the largest and most well known foundations in the UK and beyond.

The six-figure major donor programme is just at the beginning but showing great potential. RBL boasts a well established special events programme, successful mass marketing programmes, and senior leadership appetite to grow the trusts portfolio. There is significant opportunity to grow high value support from individuals.

With such a solid base to build from, the successful candidate can (and will!) own and lead the programme, be the in house expert, and transform high value giving to fund crucial services for the armed forces community.



Total fundraising income FY2024 (Oct-Sept) £62.3million

High Value Giving Target FY2024 £1.2million



High Value Income FY2024 £1.2million	Trusts & Foundations £795k	Mid Value £329k	Philanthropy £100k
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The role: Head of Trusts and Philanthropy

With experience of building relationships with Major Donors and Trusts, you will be responsible for developing and managing long-term relationships with current donors, and for creating and implementing a stewardship programme. You will be responsible for building long-term development of the Mid-Value and Trusts programmes, using the iconic Poppy Appeal, which is part of the fabric of UK society, to engage mid and high value audiences.

This new role will lead a team of five, responsible for managing relationships with RBL's trust and foundation and major giving supporters, ensuring excellent relationship management and stewardship to maximise income and growth. A newly formed mid value team also reports into this role, with a focus on increased retention, a reduction in attrition, growth in the short to medium term, with an ultimate focus on legacy pledges.

Areas of potential

There is a fantastic base level of activity, engaged trust and foundations who support at a high level year on year, and a target which is achievable based on business as usual. What is needed is a candidate with the experience, energy, and expertise to recognise this opportunity and take the programme to the next level. The post holder will lead by example by cultivating large scale funders in the UK and internationally, and use robust internal networking to build out a major donor programme, whilst overseeing an experienced mid value team to continue to deliver brilliant results.

This is a fantastic opportunity to own, grow, and lead a high value programme, maximising growth within a trust and foundations and lay the foundations for long term growth of major giving.





The role: Head of Trusts and Philanthropy

Areas of challenge

The team has been without a senior presence in this role for some time, so there is a sense of urgency to find someone with strong relationship management skills, who can work across both their team, supporters and key stakeholders effectively.

From the leader of the Trusts and Philanthropy team we need to see ambition, but also compassion from the post holder - a mix of driving the team forward, but in a high challenge, high support manner. The team is awash with potential, we need someone who can hone in on where to prioritise.

We also need someone who can get to know the cause, understand what RBL does and how to communicate it effectively to donors. There is a lot of misunderstanding of RBLs work and communicating the cause with passion will be key to secure high value support.

The successful candidate

We are looking for an experienced high value fundraiser who can understand and act on the potential in the high value programme, bring internal stakeholder management skills, alongside excellent supporter management experience.

The role requires someone who is comfortable working on their own initiative, being the in house expert in major donors, trusts and high value giving, and be a champion for best practice in the philanthropy function.

Line management support is there to help the post holder get up to speed with the organisation, help make connections and understand ways of working, but there is an expectation that the successful candidate will be able to deliver high value activity without direction or hand holding.

Why is the role vacant

Following a restructure where Philanthropy was brought beneath Supporter Development, the role was filled for a few months as a development opportunity for a valued internal candidate. However the size of the role and the potential within the portfolio demonstrated that the permanent post holder needs to have significant experience across high value fundraising, managing key stakeholders and confidence in taking a proactive approach to high value income.

The role was advertised earlier this year, recruitment was paused to allow for a re-evaluation of the responsibilities and compensation package.

Since then, the role has moved up a salary band which is reflective of the level of responsibility and objectives of the position,

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Hear from the Philanthropy team members...

“The team is currently in a very exciting phase, with a chance to make a real difference in the high value area. As a team we are keen for growth and success, we know and enjoy being part of making a big impact within RBL and its wider community.

We are a close, happy and friendly team, always on hand to help each other and the wider organisation, we face challenges together and like to talk things through to get everyone's opinions and experience, and we celebrate successes this keeps us driven and excited for the future.

We are looking forward to welcoming someone with a deep understanding of philanthropy and wider fundraising, significant experience to help us reach our goals and ambitions for each area and continuing to help us grow our own personal knowledge and understanding. Someone with compassion, focused and forward thinking, a big team player who can enjoy the fun side of life as well as the serious business of making an impact. We enjoy each others company and can be found to be having a giggle so we are looking forward to someone to join us on our exciting journey.”



Job Description: Head of Trusts and Philanthropy

Key Responsibilities:

High value giving

- Devising and developing a growth strategy for trusts and foundations
- Personally managing a portfolio of the highest value supporters, including creating bespoke cultivation and stewardship plans, proposals and reports
- Engaging senior leadership in the development of high value relationships
- Setting income and expenditure budgets, managing spend and progress against income targets, and reforecasting
- Line managing three line reports, including setting KPIs and objectives, measuring progress against these, and creating personal development plans
- Working closely with the Case for Support function to understand areas of RBL service delivery most appealing to high value prospects and supporters, and developing engaging proposals from these
- Working closely with the Prospect Researcher to refresh pipelines for the trusts team, and oversee the moves management process through regular pipeline reviews
- Working closely with the Special Events function to ensure opportunities to cultivate and steward high value audiences with an engaging event portfolio

Budgeting and reporting

- Develop the income and expenditure budget for the Philanthropy team
- Track income and spend against targets, producing accurate monthly financial reports and quarterly reforecasting as required, alongside monthly management accounts budget commentary

Internal and external stakeholder management

- Build and maintain robust working relationships across RBL to ensure organisational awareness of and support for high value fundraising
- Lead on management of most significant high value supporter relationships, including development of bespoke engagement, cultivation, and stewardship plans, bespoke proposals and reports



Job Description: Head of Trusts and Philanthropy

Key Responsibilities continued:

Internal and external stakeholder management continued

- Close working with Case for Support team to ensure the needs of high value fundraising are reflected in Case for Support collateral
- Close working with Special Events to ensure access to high profile events for Philanthropy supporters
- Lead on raising awareness of Philanthropy across RBL through presenting at departmental meetings, building robust working relationships with colleagues, and securing support from senior leadership in the engagement, cultivation, and stewardship of Philanthropy supporters

Line management

- Responsible for line management of Trusts Manager, Mid Value Manager, and Prospect Researcher including setting objectives, developing personal development plans, and ensuring the team have the necessary skills and abilities to meet the fundraising needs of the organisation
- Ensure that the Philanthropy team have access to ongoing training and development opportunities
- Overseeing the management of the trust fundraising programme to realise budget
- Overseeing the management of the mid value programme to realise budget

This job description reflects the current scope of duties and responsibilities of the role. The post holder may be asked, and is expected, to undertake any other duties commensurate to the grade of the post. As duties and responsibilities change and develop, this job description will be reviewed and may be subject to amendment.





Job Description: Head of Trusts and Philanthropy

Key Responsibilities continued:

General

- To live The Royal British Legion's shared values (Service; Collaboration; Passion; Excellence; Valuing our people) in the way you work and engage with others - the fundamental beliefs and qualities of who we are and what we do
- To be responsible for your own health and safety and that of your colleagues, enacting Health & Safety at Work Act (1974) and relevant legislation, including reporting any health and safety hazard immediately you become aware of it
- To uphold the requirements of the General Data Protection Regulations and Data Protection Act 2018
- To maintain required levels of confidentiality regarding information that you come to possess in the course of your work which is commercially or personally sensitive
- To be inclusive and equitable in your treatment of any parties you engage with through your duties, upholding RBL's Diversity & Inclusion policy and ensuring that we act as an equal opportunities employer and in accordance with the Equality Act (2010)

Service

Collaboration

**Valuing our
people**

Excellence

Passion

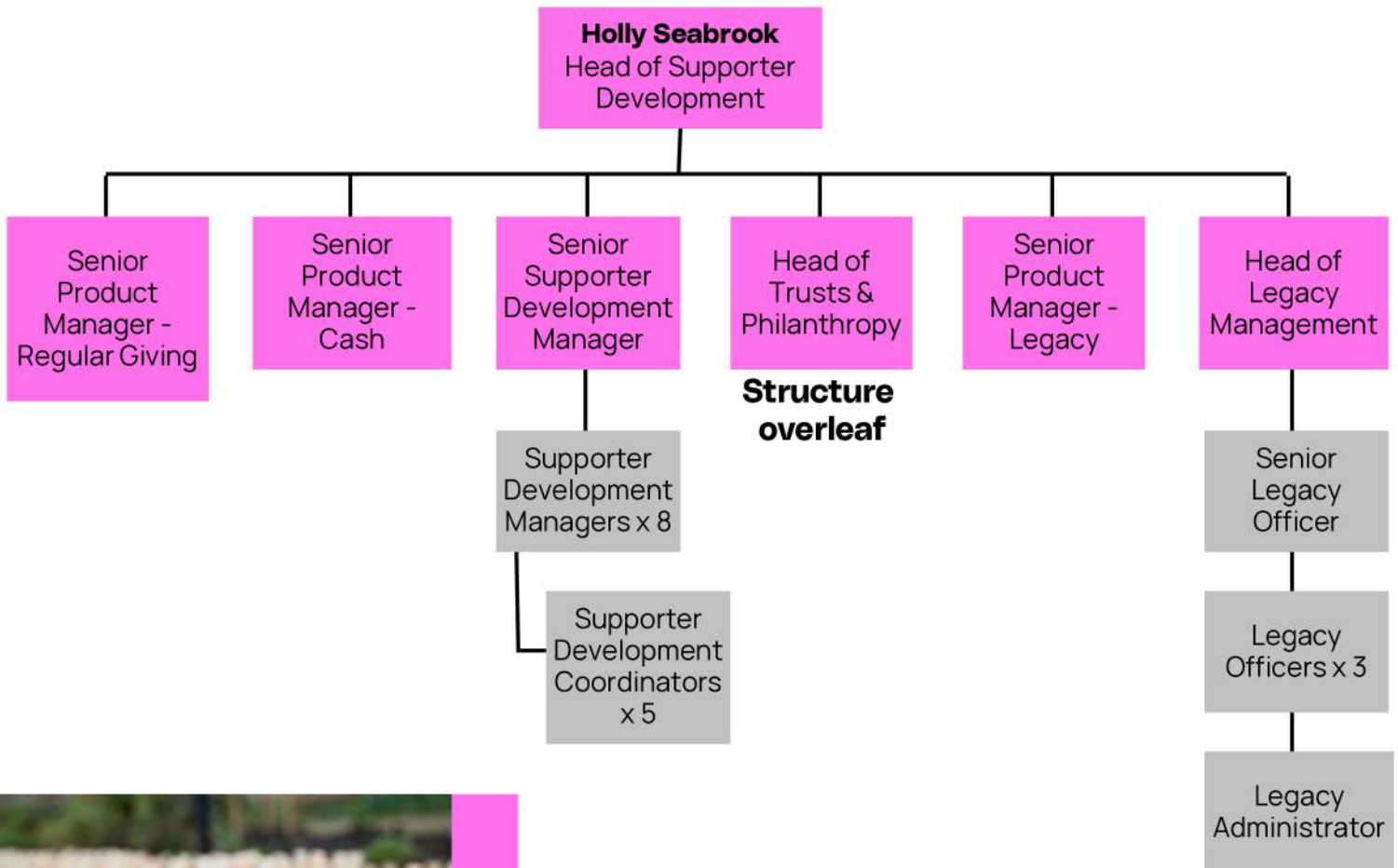


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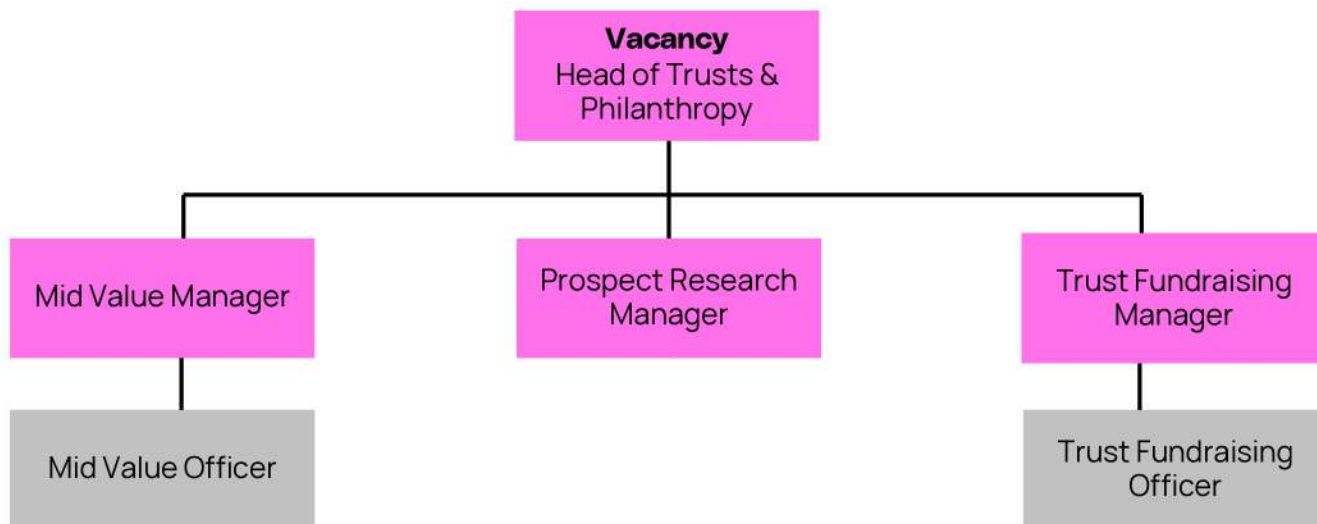
Person Specification:

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Experience and Knowledge</p>	<p>Demonstrable experience of leading, managing, and developing a Philanthropy function with a focus on trusts and foundations</p> <p>Demonstrable experience of managing relationships with a portfolio of trusts and foundations to secure significant levels of income</p> <p>Experience of influencing to secure support for fundraising</p> <p>A thorough understanding of the UK trusts and foundations landscape</p> <p>Demonstrable experience of setting and tracking income and expenditure budgets, and of reforecasting</p> <p>Demonstrable experience of excellent internal stakeholder management</p> <p>Experience of building cases for support; identifying areas of service delivery most appropriate for high value audiences, creating compelling collateral from these</p> <p>Experience of tracking moves management through a CRM</p> <p>Clear understanding of the application of GDPR and data protection legislation in relation to high value fundraising programmes</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Skills and competencies</p>	<p>The intellectual curiosity to understand the needs of the community which the RBL serves, and to develop fundraising propositions around the services the RBL delivers</p> <p>Verbal and written communication skills that enable candidate to confidently engage, influence, establish trust, negotiate with and report to a range of diverse and high value stakeholders. E.g. from writing compelling cases for support to impact reports, engaging with board members to cultivating donors</p> <p>Numeracy skills that demonstrate competence and accuracy across income and expenditure budget setting, forecasting, and reforecasting</p> <p>Keen attention to detail with good analytical skills</p> <p>Competent user of MS Office, comfortable using CRM systems to track Philanthropy fundraising</p>

The Supporter Development Department



The Philanthropy Team



Don't just take our word for it, here's what members of the RBL Philanthropy Team have to say....

"I'd say that this is a rare opportunity to be the in house expert in high value and take the programme to the next level. There is a large and long standing pool of trust and foundation supporters, alongside a portfolio of engaged major donors and prospects, impactful services against which to fundraise, and organisational support to understand the opportunity for high value fundraising.

The role would suit someone who is a natural relationship manager, who is keen to build relationships across an organisation in support of high value fundraising, and who is ready to own and lead a high value programme with masses of potential."





Benefits and life at the Royal British Legion

RBL employs c 1,800 people across the country campaigning on behalf of the Armed Forces community, delivering support services to them, leading Remembrance on behalf of the nation, raising funds to support our work and developing and running the organisation and our network of membership branches.

It's an exciting time to be part of both changing the lives of our customers and changing the organisation and its future capacity and capability. This presents considerable opportunities for learning within role, and possibilities for career development...and, of course, the satisfaction that comes with knowing that you are making a real difference to the lives of those who serve/have served our country, to keep us safe and to protect our democratic freedoms and way of life.

Annual Leave

28 day's paid holiday per year (plus bank holidays), increasing to 30 days after 5 years, plus the ability to buy up to 1 working week of additional leave.

Pension

Contributory pension scheme – min 2% employee contribution receives 6% employer contribution up to max of 10% employer contribution matched with 5% employee contribution. (until 5 years' service reached, when 14% employer contribution achievable)

Death in Service

Death-in-service Life Assurance, with a benefit of 3x annual salary.

Flexible Working

RBL considers any flexible working requests in line with personal and business need. Many of the Supporter Development Team work compressed hours and flexible working patterns.

Other

Employee Assistance Programme and Togetherall access
Season Ticket and Rental Deposit Loan Schemes / Cycle to Work Scheme
Reward Hub online benefits platform with extensive offers and discounts

If you have questions about the benefit package, or if there are policies you would value seeing before continuing in the selection process, please do reach out via recruitment@thinkcs.org and we will be happy to find out the information you need.

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Benefits and life at the Royal British Legion

Working from London Haig House

The Royal British Legion is fortunate to have an amazing, modern office space on Borough High Street, just a 3 minute walk from the famous Borough Market.

Collaborative, face to face working is important to RBL as part of the 'One Legion' ethos. Sharing working space can help build connections and encourage learning from peers, colleagues and volunteers.

The successful post holder will work from Haig House at least two days a week, the High Value Team and colleagues from the Supporter Development team are usually in Thursday and at least one other day.

What the team say about working at the Royal British Legion;

"We have a friendly and supportive team, modern, well-equipped offices, dedicated and committed supporter base, regular team get togethers, opportunities for progression, huge potential for income growth and flexible working practices."



Transport

- 3 minute walk - Borough Station (Northern line)
- 8 minute walk - London Bridge Station (Network Rail, Jubilee and Northern lines)
- 15 minute walk - Monument Station (Circle and District lines)
- 18 minute walk - Elephant & Castle Station (Bank and Northern lines)

Diversity, Equality and Inclusion

The RBL are committed to building a truly inclusive organisation of diverse people and perspectives.

They recognise that they are not where they would like to be, so have set out commitments to realise this ambition and are actively engaged in a programme of work to develop our practices.

They are committed to keep listening, learning, and sharing their progress and impact.

Applications are especially welcome from;

- People with a disability
- People of non-White British ethnicity; who are currently under-represented in the RBL workforce
- People who are LGBTQ+; a group that has been marginalised in the past in the Armed Forces community

As a Disability Confident employer, RBL guarantees an interview to any applicant who declares a disability on application and whose application demonstrates that they meet the Person Specification criteria.

If there is anything THINK Recruitment can do to make any reasonable adjustments to ensure you can engage fully in the selection process please contact Jo McGuinness at recruitment@thinkcs.org for a confidential discussion.





To apply

To express interest in this role, and to arrange an initial conversation with THINK Recruiting please email recruitment@thinkcs.org with a copy of your CV and contact information. Our Recruitment Manager will have a screening conversation with all applicants prior to shortlisting. Rather than requesting candidate submit a supporting statement or cover letter, we will provide interested candidates with 3 short screening questions to answer ahead of the role closing.

We can organise an informal conversation with Holly Seabrook, the recruiting manager. If you would like to speak with Holly, please flag this during your initial call with THINK Recruitment.

Screening calls with THINK Recruitment	Informal conversations with recruiting manager	Closing date	Stage 1 Interviews	Stage 2 interviews	Decision by
Wednesday 24th July - Monday 12th August	Time held on 29th July, 1st, 2nd and 7th August	Midnight Tuesday 13th August	Tuesday 20th August	Thursday 22nd August	Friday 23rd August

Invites to interview will be sent on the 14th or 15th August to ensure candidates have time to prepare.

First round interviews will be held in person at the Royal British Legion Head Office in London. The interview will consist of a presentation task and panel interview with Holly and Suzanna Lopez, RBLs Philanthropy Consultant. Panel questions will be provided to candidates at point of invite.

The second round will consist of a conversation with Holly and Rufus Cruft, Director of Fundraising.



If there are any reasonable adjustments THINK Recruiting can make to ensure ease of participation in the selection process, please do get in touch. All discussions are confidential. Thank you for your interest, we hope to hear from you soon.

Jo McGuinness
Recruitment Manager - THINK Recruitment
jomcg@thinkcs.org