

Vacancy Information Pack



# Portfolio Development & Innovation Manager

Closing date: 23/05/2024



# Thank You

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Thank you for your interest in this opportunity.

We're recruiting a Portfolio Development & Innovation Manager to help us review and evaluate the performance of our Fundraising portfolio, drive us forward with strategic recommendations and design our new Fundraising Innovation strategy. This exciting role forms part of the new Fundraising Planning team, following the launch of the Three Giants Fundraising strategy, and is imperative in accelerating us to meet our strategic goals. You'll be imperative in the department's decision-making processes, helping to drive change through an audience and KPI focused approach.

The Portfolio Development & Innovation Manager will work closely with our Planning, Compliance and Case for Support functions within the team to help us deliver our new vision. We're looking for a creative, imaginative expert in communication; someone that thrives on audience insight and is an expert in translating complex data to help teams work efficiently and effectively towards their goals. And you've always got an eye on sector trends as well as the external environment, horizon scanning to maximise on the most effective, relevant opportunities. You might have worked in an innovation role before, or just have a vision for how to set up an innovation team that could thrive.

If this sounds like you, please read on and consider putting in an application. I look forward to reviewing your experience and motivations and maybe meeting you in the coming weeks. If you want to learn more about the role, please reach out to me for more information and an informal chat on [shodges@britishlegion.org.uk](mailto:shodges@britishlegion.org.uk)

Kind regards,

Sami Hodges  
Head of Fundraising Planning



# Job Description

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**Job Title:** Portfolio Development & Innovation Manager

**Reporting To:** Head of Fundraising Planning

## Role Purpose:

This new role reports into the Head of Fundraising Planning and has responsibility for reviewing and evaluating the performance of our current portfolio of Fundraising products and channels, and providing future recommendations in line with the directorate's strategic plan, ensuring that we meet supporter needs. This role will also be responsible for designing our fundraising innovation strategy, then operationalising it by embedding news processes and toolkits within the organisation, with scope to develop and test new activity.

Working with all teams in Fundraising, you will lead on the annual evaluation of Fundraising products and identify opportunities for investment as well as those areas for disinvestment. Utilising insightful intelligence on changes and trends in the charity sector and the external environment, as well as internal insights and data, you will advise Fundraising on the product portfolio to ensure that it meets the operational and strategic plans.

The postholder will be expected to embrace the One Legion culture to support a joined up approach to working together with colleagues across the charity.

## Key Responsibilities:

### Reporting

- Lead the annual fundraising portfolio process to review and evaluate the performance of our current Fundraising products, and provide recommendations for investment and disinvestment of products in line with the directorate's strategic plan
- Develop an annual fundraising portfolio report, covering both financial and non-financial outcomes, with recommendations which maximise the department's ability to meet its strategic objectives
- Undertake additional portfolio or product reviews as directed by HOD Strategic Planning

### Strategy development

- Work with teams across the organisation to audit existing innovation projects and requirements
- Lead on the design and development of a new innovation strategy for Royal British Legion's fundraising
- Develop new processes and a toolkit to operationalise the new strategy
- Influence teams across the organisation to understand the value of innovation, and its place in the directorate's overarching strategy

### Stakeholder Relationship Management

- Work with the Data & Insight team to ensure relevant data & insights are provided to aid decision making, including from new Supporter panels
- Work with all Fundraising teams to collate relevant information on each fundraising product to enable the annual portfolio review,
- Work with the HOD Fundraising Planning to present your findings to relevant stakeholders, including the Director of Fundraising

### **Research and Insight**

- Collate insightful intelligence on changes and opportunities in the charitable sector and in the external environment, as well as from our new Supporter Panels, to inform decision-making
- Utilise insight and research to inform emerging trends, new opportunities, areas of incremental growth, as well as areas of risk and challenge, both in the short and longer term

### **People Management**

- Recruit a new Portfolio Development & Innovation Officer, effectively leading, inspiring, managing and developing them within your new team, ensuring they are enabled to make an effective contribution.

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.

### **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).

## Person Specification

Criteria	Essential / Desirable	How to be measured
<b>Knowledge &amp; Experience</b>		
Experience of assessing and reviewing a diverse product portfolio, then identifying and prioritising requirements and opportunities in line with strategic plans	E	Application/Interview
Experience of analysing and evaluating data, distilling complex information and articulating it in an engaging, digestible manner	E	Application/Interview
Experience of external research into sector trends and the external environment	E	Application/Interview
Experience of presenting information and reports to a variety of audiences	E	Application/Interview
Experience of line management	D	Application/Interview
Experience of utilising supporter and donor insights to help inform decision making	E	Application/Interview
Experience of managing and reporting on significant income and expenditure budgets	E	Application/Interview
Experience in an innovation role	D	Application/Interview
<b>Skills &amp; Attributes</b>		
Empathy with the mission, objectives and values of the Royal British Legion	E	Application/Interview
Strong planning skills with the ability to develop and implement new ways of working with internal and external stakeholders	E	Application/Interview
Significant project and programme management skills	E	Application/Interview
Excellent communication, influencing and relationship skills with internal and external stakeholders at all levels	E	Application/Interview
Takes a logical, analytical approach to problem solving and pays close attention to detail.	E	Application/Interview
Exceptional organisational skills and attention to detail, with the ability to prioritise and work well under pressure	E	Application/Interview

During the selection process, we will also use values-based competency assessment to understand your alignment with RBL's values:

### **Service**

We support and serve. We are compassionate. We provide great customer care to all the people who come into contact with us. We are accountable and act with integrity.

### **Collaboration**

We value working together and with partners to achieve shared goals. Through strong communication and support, we build trust with each other and treat everyone with respect and honesty.

### **Passion**

We are passionate about our role and contribution. With a positive outlook we are resilient and committed to our work.

### **Excellence**

We strive to be the best we can. We are effective and efficient. We are bold. We are open to new ideas and approaches, challenge each constructively and are willing to learn.

### **Valuing our People**

We support, encourage and provide opportunities for all our people – ensuring we recognise and value everyone's contribution.

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## Offer Terms

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### **Work Pattern**

35 hours per week, Monday-Friday, 9am-5pm

### **Location**

Your contractual place of work will be London Haig House.

### **Compensation**

£41,172 to £44,232 per annum (Inclusive of London Supplement)

### **Employee Benefits**

- 28 day's paid holiday per year (incl. statutory), plus the ability to buy up to 1 working week of additional leave
- 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 Life Assurance, with a benefit of 3x annual salary
- 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

## Working for RBL

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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.

We work collaboratively across our workforce and operate flexible hybrid working practices in our major hub offices, using the latest technology to stay connected with colleagues, members, and beneficiaries. We come together around our common [purpose](#), and our values.

RBL is modernising, and we are ambitious to deliver more for the communities we support. We are becoming a more inclusive, flexible, customer-focused, data-driven, and collaborative organisation. But don't just take our word for it. Read our employee stories [here](#), and about our impact [here](#).

It's therefore 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.

## Diversity, Equality and Inclusion

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

We recognise that we are not where we would like to be, so we have set out [our commitments](#) to realise this ambition and are actively engaged in a programme of work to develop our practices. We will keep listening, learning, and sharing our progress and impact.

We especially welcome applications from people with a disability and people of non-White British ethnicity who are currently under-represented in our workforce, and people who are LGBTQ+, a group that has been marginalised in the past in the Armed Forces community.

As a Disability Confident employer, we guarantee an interview to any applicant who declares a disability on application and whose application demonstrates that they meet the Essential criteria of the role, as set out in the Person Specification.

## How to Apply

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Your application should be submitted through our jobs site at [Find A Role | Careers | Royal British Legion](#).

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