



## THE ROYAL BRITISH LEGION/POPPYSCOTLAND/NMA

**Job Title**                      **Head of Innovation and Planning**

**Reporting To**                Assistant Director of Fundraising Operations

**Responsible For**          Innovation & Planning Manager; Supporter & Communications & Planning Manager

### **Role Purpose:**

Overall: The Head of Innovation and Planning leads the TRBL Fundraising team responsible for the effective management of Innovation, Planning and Portfolio.

Planning: Ensures a robust supporter journey and experience through customer centric planning of activity

Innovation: Responsible for direction and delivery of strategic innovation cycles, supporting incremental innovation and supporting transformational innovation initiatives.

Portfolio Management: Regularly review and make recommendations for investment and disinvestment decisions around the portfolio of products and channels.

### **Key Responsibilities:**

- Lead, manage and develop the innovation and planning team to ensure they effectively support fundraising.
- Develop and manage key relationships across the organisation to ensure engagement and support of activity led by Innovation planning.
- Maintain and disseminate insightful intelligence on changes in the charitable sector and aligned sectors to ensure operational and strategic planning is robust and informed.
- Lead the development of Fundraising's first content strategy with the governance of Fundraising's Leadership Team, delivering insight led and tested content to support strategic FR objectives for key stages of the supporter journeys.
- Lead the introduction and development of Fundraising's first data driven supporter communication strategy, using owned and external insights to develop the framework for best practice use and governance of the supporter CRM to deliver on and measure long term FR strategy
- Responsible for setting and delivery of fundraisings innovation strategy. This will deliver a core departmental objective to diversify income streams and minimize organizational funding risk.
- Responsible for the prioritisation and delivery of innovation sprints throughout the year launching new products to the fundraising portfolio with a goal of delivering the



- established income benchmark relevant to the size/sector of the innovation opportunity.
- Making resources available to support teams with incremental and product specific innovation, enabling incremental improvements in fundraising product performance and product portfolio performance
  - Ensuring fundraisers are trained with the appropriate tools to normalise innovation across the department. Delivering a shift in behavior with the status quo challenged and continuous improvement second nature.
  - Oversee fundraising product portfolio to drive product strategy development. Ensuring the analysis is balanced and robust including external and internal sector and product holding analysis.
  - Recommend to the senior leadership team where to investment and disinvestment across the product portfolio to ensure balance and to maximize the department's ability to meet its strategic objectives.
  - Introduce criteria and implement processes to track the charity's progress in delivering the fundraising plan and strategy, reporting back to the Fundraising Leadership Team.
  - Support product owners in the annual product planning process (including budgeting) by developing product strategies based on the findings of the product portfolio work and additional analysis activity.
  - Own integrated customer communications planning and ensure all activity is aligned to the fundraising and product strategies, and departmental communication business rules. This will ensure our supporters receive the right communications at the right time and don't feel overwhelmed with contact from the Legion.
  - Investigating and reviewing the use of existing and new communication channels and making recommendations for roll out and for optimization across the department. This will result in recommendations for investment and removal of channels across fundraising
  - Define and embed a framework for fundraising supporter journeys to drive creation and review of existing journeys ensuring a consistent experience for supporters.
  - Ensure Fundraising's core messaging supports wider charity strategy and objectives, particularly Marketing's.
  - Investigating supporter motivations and driving work that delivers these insights for FR teams to implement in their planning and campaign development.

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 work in accordance with The Royal British Legion's shared values of **Service; Collaboration; Passion; Excellence; Valuing our people** which underpins 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, in accordance with the Health & Safety at Work Act (1974) and relevant legislation, including reporting any health and safety hazard immediately you become aware of it.
- To work in accordance with the General Data Protection Regulations and Data Protection Act 2018.
- It is clear that due to the nature of the work of the Legion, the post holder may have access to material which is confidential. It is a condition of their contract of employment that they ensure that no confidential material is leaked from the department to unauthorised personnel.
- To implement the Equal Opportunities Policy into your daily activities. Royal British Legion is an equal opportunities employer and positively encourages applications from suitably qualified and eligible candidates regardless of sex, race, disability, age, sexual orientation, gender reassignment, religion or belief, marital status, or pregnancy and maternity. All employees are required to work in accordance with the Equality Act (2010).



Consider if the criteria are essential, can training be provided or candidates upskilled.

**PERSON SPECIFICATION**

CRITERIA	ESSENTIAL / DESIRABLE	HOW TO BE MEASURED
<b>QUALIFICATIONS</b>		
Educated to Bachelor Degree or has relevant professional qualification in Marketing or Fundraising	D	Assessment/Interview
<b>KNOWLEDGE &amp; EXPERIENCE</b>		
Expert knowledge and significant experience of working within innovation, marketing or fundraising.	E	Assessment/Interview
Significant project and programme management skills	E	
Takes a logical, analytical approach to problem solving and pays close attention to detail.	E	
Management experience of planning, implementing, developing and reviewing operational plans	E	
Knowledge or experience of delivering CRM strategies and work streams	E	
Experience or knowledge of writing effective strategies for long term planning and impact	E	
Experience of managing budgets including forecasting, monitoring and managing targets	E	
Significant experience of line managing staff and providing opportunities for professional development	D	
Experience of working in a voluntary/ third sector Organisation	E	
Experience of managing external partner relationships.	E	
Experience of assessing and reviewing a diverse product portfolio	E	
Experience of assessing financial viability of products.	E	
Experience of planning and implementing supporter journeys	E	
<b>SHARED VALUES AND BEHAVIOURS</b>		
<b>Service</b>		Interview



<p>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.</p> <p><b>Collaboration</b> 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.</p> <p><b>Passion</b> We are passionate about our role and contribution. With a positive outlook we are resilient and committed to our work.</p> <p><b>Excellence</b> 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.</p> <p><b>Valuing our People</b> We support, encourage and provide opportunities for all our people – ensuring we recognise and value everyone’s contribution.</p>		<p>Interview</p> <p>Interview</p> <p>Interview</p> <p>Interview</p>
<b>SKILLS &amp; ATTRIBUTES</b>		
Exceptional communication skills – written and verbal	E	Interview/Assessment/ Application
Exceptional communication skills – written and verbal	E	Application/Interview
Exceptional interpersonal skills – able to engage effectively with a range of audiences	E	Application/Interview
Exceptional planning and organisational skills - able to prioritise workload effectively	E	Application/Interview
Experience of programme and project management methodology tools and techniques	D	Application/Interview
Strong team player - able to work effectively with diverse client groups	E	Application/Interview
Strong IT skills – competent user of MS Office and familiar with in-house database systems	E	Application/Interview
Ability to demonstrate an understanding and commitment to our corporate values	E	Application/Interview
Strong negotiation skills	E	Application/Interview
Strong skills of analysing complex data and distilling into meaningful insights.	E	Application/Interview
Excellent people management skills	E	Application/Interview
Empathy with mission and values of the Legion	D	Application/Interview