Planning & Performance Lead

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| **Job Level** | Level 5 | **Job Reference No:** |  |
| **Role review date:** |  |
| **Directorate** | Marketing & Fundraising | **Function** | Strategy & Portfolio |
| **Service** | Strategy & Innovation | **Reports to:** | Head of Strategy & Portfolio |

Scale and scope of role

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| **Direct reports** | 0 | **0** |  |
| **Budget responsibility/**  **accountability** |  | **Accountable for other resources** |  |

Context

We help anyone, anywhere in the UK and around the world to get the support they need if crisis strikes: connecting human kindness with human crisis.

We enable vulnerable people in the UK and abroad to prepare for and withstand emergencies in their own communities. And when the crisis is over. We help them to recover and move on with their lives.

We are part of the Red Cross and Red Crescent global humanitarian network.

Our Values and Principles

Our values (compassionate, courageous, inclusive and dynamic) underpin everything that we do. As a member of the Red Cross and Red Crescent Movement, the British Red Cross is committed to, and bound by, its [fundamental principles](http://www.redcross.org.uk/principles): humanity, impartiality, neutrality, independence, voluntary service, unity and universality.

Diversity

At the British Red Cross, we are looking for the right people to help us provide support to millions of people affected by crisis. We want out team to reflect the diversity of the communities we serve, offering equal opportunities to everyone regardless of age, disability, gender reassignment, marriage and civil partnerships, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

Diversity is something we celebrate, and we want you to be able to bring your authentic self to the British Red Cross. We want you to feel that you are in an inclusive environment, and a great position to help us spread the power of kindness.

Purpose of the role

This role ensures planning and performance processes in Marketing and Fundraising are delivered and continuously improved, and our portfolio is proactively managed to deliver the right outcomes in the most efficient and effective way. This includes creating the portfolio plan and driving data-based decision making based on its performance. The role collaborates with stakeholders at all levels within Marketing and Fundraising and across the organisation to ensure high quality strategic plans are in place, which deliver on our aims. They are strategic and commercial, ensuring we take a view across our entire portfolio, and make sure we make decisions to deliver as much income and impact as possible.

Key responsibilities

**Lead effective planning processes for Marketing and Fundraising to keep the strategic goals of M&F on track.**

* Design, deliver and iterate planning processes within Marketing and Fundraising to ensure strategic and portfolio plans are in place, and are managed proactively to make effectiveness and efficiency improvements and drive outcomes.
* Collaborate with colleagues in Marketing and Fundraising and across the organization, to ensure plans meet organizational requirements.
* Integrate multiple levels of activity into plans, ensuring the process is as efficient as possible for stakeholders to take part in.
* Lead, through facilitation and collaboration, colleagues to develop a portfolio plan of activity which that drives optimal engagement and results for key audience groups so that we deliver an excellent supporter experience and meet our income targets.

**Deliver and iterate excellent performance processes in Marketing and Fundraising**

* Maintain a holistic performance dashboard to meaningfully summarise the most pertinent metrics, to evaluate performance and enable key decision making.
* With Strategy and Portfolio colleagues, lead stakeholders of all levels in the discussion of performance, and adaptive planning.
* Work closely with senior leadership and the Data, Insight and Evaluation team to embed a performance led culture is embedded, where meaningful measures are consistently monitored and shared to inform planning, decision-making and strategy development.
* Coach colleagues to understand their performance and support them to adopt tools and frameworks and make the best data based decisions about future activity and focus.
* Work closely with the Data, Insight and Evaluation team to maintain a repository of valuable insight into performance and trends.

**Emergencies**

Provide surge support and cover for Emergency appeals. This may occasionally include working outside normal hours as part of an on call rota

**Team Member**

* Actively participates in all team meetings.
* Supports other team members
* Works and behaves in accordance with all BRC policies, procedures and in line with our Values in Action.
* Upholds the fundamental principles of the Red Cross and acts with integrity, in accordance with the Society’s values (inclusive, compassionate, courageous and dynamics)

The duties and responsibilities described are not a comprehensive list and additional tasks may be assigned from time to time that are in line with the level of the role.

Pre-engagement checks

Criminal Records

Type of criminal record checks required for this role please delete as required, leave all 3 check headings on role profile

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| --- |
| England and Wales – Disclosure and Barring Service (DBS) |
| * None |
| Scotland |
| * None |
| Northern Ireland |
| * None |

Drivers Check - No

Person Specification

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| --- | --- | --- | --- | --- | --- | --- |
| **Requirements** | Evidence obtained through Shortlisting (S), Interview (I), Assessment (A) | | | | | |
| **Knowledge and Skills** | **S** | | **I** | | **A** |
| **Essential**   * Extensive computer skills (advanced Excel), and the ability to produce reports, spreadsheets and PowerPoint presentations * Ability to research, assimilate and analyse written and financial information quickly and accurately. * Excellent written and verbal communication skills, with the ability to present to all levels and tailor content to the appropriate audience * Ability to work under pressure, to tight deadlines, revising priorities to manage incoming work and tasks while maintaining high standards. * Excellent planning and project management * Excellent written skills including report writing * Facilitation skills * Good understanding and experience of marketing and fundraising, including multi-channel communications   **Desirable**   * Customer experience / Supporter experience * Accounting systems * Knowledge of the humanitarian sector | **S**  **S**  **S**  **S**  **S**  **S**  **S**  **S** | | **I**  **I**  **I**  **I**  **I**  **I**  **I**  **I**  **I**  **I**  **I** | |  |
| **Experience** | **S** | | **I** | | **A** |
| **Essential**   * Experience of business planning, strategic planning, and implementation * Experience of budgeting as part of a wider planning process. * Experience of corporate / organisational performance management. * Experience coordinating complex projects with multiple stakeholders.   **Desirable**   * Experience of supervising project teams or overseeing the work of others | S  S  S  S | | I  I  I  I  I | |  |
| **Additional requirements** | | | | | |
| **Essential**   * Ensures inclusive practice, challenges discrimination and promotes diversity in line with our [Equality, Diversity and Inclusion (EDI) policy](https://www.redcross.org.uk/about-us/how-we-are-run/our-policies/equality-and-diversity-policy). |  | | I | |  |
| **Values in Action** | | | | | |
| **Dynamic** - We move forward as one team.  - Every day, we’re adapting, innovating and learning.  - When the unexpected happens, we are calm, quick and efficient.  - We respond smartly, using clear processes and systems.  **Compassionate** - We stand for kindness.  - People come first, no matter who or where they are.  - We have genuine, open-minded conversations.  - Together, we’re a united force for good.  **Inclusive** - We are open to all.  - We treat each other with dignity and respect.  - Every person’s uniqueness is valued, supported and celebrated.  - Our individual backgrounds and experiences make our organisation stronger.  **Courageous** - We are bold.  - We show our strength by doing the right thing.  - We aren’t scared to test our creative ideas.  - As humanitarians, we go the extra mile to help people in crisis | | **I**  **I**  **I**  **I** | |  | |

We guarantee an interview to disabled candidates (as defined in the 2010 Equality Act), who meet the minimum shortlisting criteria in the advertised person specification and apply under the disability confident scheme.