



JOB DESCRIPTION

Title: Interim Senior Legacies and Endowment Manager

Reports to: Membership Director

Context

The Royal Ballet and Opera (RBO) leads the way in opera, ballet, music and dance, both live on stage and digitally through live-streaming and worldwide cinema screenings. We are home to The Royal Ballet, The Royal Opera, and the Orchestra of the Royal Ballet and Opera. We could not maintain this range of work or our digital presence without support from philanthropists, funders, members, business partners and sponsors.

This role plays a key part in the highly committed and successful Development and Advocacy Department, which generates over £41m revenue annually, plus additional capital funds, and secures the annual Arts Council England grant (currently £22.9m). The Department's revenue generation and advocacy to Government of the value of our creative sector, ensures the RBO can retain the best artists and crafts people, deliver our thriving National Schools' Programme, maintain our beautiful grade I listed building, deliver on our charitable mission, and continue to produce world class performances.

Legacies contribute circa £1.2m to the RBO per annum through the Royal Opera House Endowment Fund and approximately £500k directly to the Royal Opera House Covent Garden Foundation.

Main Purpose of the Job

- To review, build and deliver the organisation's strategy and plan for Endowment Funding and legacy-giving, to expand both, in line with our aims and charitable profile

- To work closely with other teams within Development and Advocacy (D&A) and the Audiences and Commercial (A&C) team to ensure a strong marketing presence, as well as timely planning and management of campaigns and events for the Legacy Programmes
- To work closely with Senior Volunteers and RBO leadership on the management, stewardship and recognition of big gifts to the Endowment Fund
- Line management of the Legacy Manager
- Oversee financial tracking of income to the Royal Opera House Endowment Fund (ROHEF)
- Prepare and then present the papers for the Endowment meetings (3 times per year)
- Oversee the running of the 'Baton Associates' programme (legacy givers who have let us know their intention to give), including the Baton events (3 times per year)
- To manage own learning and contribute to a culture of continuous improvement
- To play a key role in achieving the annual D&A Department targets through all the above activities

Main Responsibilities

Endowment Funding and Legacy Strategy

- Be the main point of contact for the ROHEF and Trustees
- Working closely with the Legacy Manager, scope opportunities for growth of the current model for legacy giving, in line with our goals for audience development, departmental giving targets and the options for benefits and events
- Review the current RBO strategy specifically for big gifts to the Endowment and legacy giving, and the range of options to give recognition for significant gifts
- Conduct research to identify and understand other successful models for legacy giving and major gifts
- Deliver the strategy for the overarching RBO legacy campaign, including programme design, opportunities to reach a broader audience, related events programmes, customer service levels and benefit delivery
- Embed the new marketing proposition for legacy giving, to maximise revenue from gifts and raise awareness
- Identify measures of success for development and growth of the legacy programme, including audience engagement with campaigns, entry to the programme and revenue data
- Identify measures of success for raising awareness of the options for receiving big gifts with a target audience, the management and stewardship of the process for receiving big gifts to the Endowment Fund

Planning to Delivery

- Attend ROHEF Trustee meetings (3 per year)
- Prepare and present reports on funded programmes and proposals for future funding for consideration by Trustees
- Development and delivery of planned activities and services for Endowment Funding and Legacy Programmes
- Grow the overall number of legacy pledgers and build the profile of the Baton Associates via:
 - Marketing launch dates and season plans
 - Budget and plan requirements for event creation and delivery; marketing collateral, communications to the Baton Associates and others as required

- Customer data selection to reach a wider audience for legacy giving, working with the relevant teams in D&A and A&C
- Identify the resource needed to deliver the planned marketing communications and events, and recommend the administrative and operational resources needed across the season
- Set the brief for any new design and marketing collateral with A&C, and for measuring success of the campaigns including digital campaigns
- Work closely with department colleagues (Senior Philanthropy managers) and Senior Volunteers to raise awareness with target groups for the opportunity for making big gifts to the Endowment (where appropriate) and identify contacts with potential for legacy giving
- Devise and deliver bespoke programmes of personalised customer care and stewardship for legacy giving or higher-level gifts as needed

Programme Leadership and Advocacy

- Ensure colleagues at all levels across RBO are effectively briefed on the legacy programmes and objectives
- Enlist the support of high-profile advocates to make the case for big gifts to the Endowment, and legacy giving, including testimonials where appropriate
- Lead on all events for legacy supporters, with a visible presence at planned events
- Develop network of contacts for legacy programmes in other organisations, within the arts sector and beyond, sharing and disseminating best practice

Relationship Management

- Take the lead in developing excellent working relationships with all partner teams and stakeholders
- Uphold the RBO's aims and policies on diversity and inclusion in all aspects of the role
- Ensure confidentiality for managing customer data and legacy giving, in line with department standards and GDPR

PERSON SPECIFICATION

Essential Knowledge/Skills and Experience

Endowment Funding and Legacy Programmes

- Extensive experience of planning and leading programmes for giving and legacy giving in performing arts/ museum/ wider charity sector, with up-to-date knowledge of tax and other technical issues
- Highly developed written and verbal communication skills, with ability to inspire and influence wide range of stakeholders
- Ability to develop a successful strategy and marketing plan for audience engagement
- Ability to devise and deliver a programme of benefits and events for supporters, working with multi-disciplinary teams for delivery
- Ability to devise bespoke programmes for stewardship of high value relationships as required

Programme Management Skills

- Excellent programme planning and project management skills, with a track record of achieving demanding goals to deadlines
- Ability to use management processes effectively to support:

- Research, analysis and reporting
- Budget analysis and presentation
- Management of customer data, in line with department standards and GDPR
- Establishment of customer service standards for all legacy giving
- Processes to enable review and continuous improvement

Relationship Management Skills

- Credibility and influence as an ambassador for the Royal Ballet and Opera internally and externally, able to operate effectively at all levels
- Excellent relationship management and development skills
- Ability to work collaboratively and encourage a collaborative working style across multi-disciplinary teams
- Strong leadership skills with the ability to engage others and meet objectives through cross team working

Continuous Improvement

- Ability to work to and support a culture of continuous improvement
- The ability to assimilate new information, and develop new skills or hone existing skills, to be able to deliver work to a high standard
- Commitment to managing own learning and continuous development relevant to the role
- Willingness to work sustainably and consider new or improved ways of working to reduce our impact on the environment.
- Commitment to understanding and upholding the charitable aims of the Royal Ballet and Opera – securing the future of ballet, opera and music, ensuring broad access to the artforms and reaching communities via our learning and participation programmes.

This Job Description reflects the current situation. It does not preclude change or development that might be required in the future.

