



# CANDIDATE PACK FOR HEAD OF PEOPLE AND CORPORATE SERVICES



# WELCOME

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Dear Candidate

Thank you for your interest in becoming our Head of People and Corporate Services (HPCS), a new role at The Robertson Trust.



We are an independent funder, half-way through a ten-year commitment to our mission. In our current three-year Plan running to March 2025, we will have committed an average of £25 million per year to charities working in Scotland. We are preparing an ambitious growth plan for the coming years.

As an organisation of more than 50 staff across two locations, we have created a new leadership role on our senior team and are now seeking a qualified senior HR professional with experience of IT and facilities. You will be ready to lead our work in these foundational areas and you will bring a demonstrable track record leading an effective People/HR function. You will have a commitment to our mission and demonstrate values-based leadership in developing our culture.

This is an exciting new role, and you will provide a dedicated lead for our People/HR, IT and Facilities support across two locations: our main offices at Robertson House in Glasgow and The Barracks Conference Centre in Stirling. The role involves a strong degree of collaboration with other teams at the Trust to ensure effective delivery for those we are here to serve, and a culture of ongoing improvement.

We are ambitious in how we go about delivering on our mission. We are open to new ideas, perspectives and challenge. We know that we will only achieve lasting solutions to poverty and trauma by getting closer to those who are experts by experience as well as the partners who serve them.

We recognise we have the greatest chance of success if our staff team draws upon a wide range of experience and knowledge. Increased diversity is a key focus for us. We want to enrich the range of experience and insight we currently have in our team by encouraging applications from people with a variety of ethnic, cultural and social backgrounds and life experiences.

If you share our commitment to building long-term solutions to poverty and trauma in Scotland, and you have the skills, experience and personal qualities to be our new Head of People and Corporate Services, we would love to hear from you.



**Jim McCormick**  
CEO



## ABOUT US

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The Robertson Trust's mission is to prevent and reduce poverty and trauma in Scotland, by funding, supporting, and influencing solutions to drive social change.

In Autumn 2020, we launched a 10-year strategy to take action on poverty and trauma – two of the most significant related challenges facing Scotland. To do this well, we must put our resources to work in a way that not only delivers impact in the here-and-now but also works upstream to prevent hardship and harm.

As we approach the mid-point of the decade and our strategy period, we have a responsibility to do more than just alleviate the worst impacts of poverty and trauma. We are committed to using our assets, our independence, our voice and the voices of our grantholders and partners to help shift the dial towards prevention and lasting social change. This is what drives our work and why we have refined our mission statement in 2024.

During this period, we marked the 60th Anniversary since the Trust was established by the three Robertson sisters, pioneering women of business and philanthropy. You can [read our story and watch the film](#) marking this Anniversary.

The Trust is the majority shareholder of The Edrington Group. Our income flows from a dividend on the company's operating profits and a significant set of pooled investments. This has enabled us to commit an average of £25M in charitable expenditure per year by 2025.

We have a Board of 12 Trustees with [Morag McNeill joining as the new Chair](#) in January 2025.

Our latest Impact Report can be viewed [here](#) – we invite you to take a look at some examples of the valuable work we have funded recently including [North Edinburgh Support Services \(NESSie\) consortium](#) and [Serving the Future](#), one of our Partners in Change collaborations between Fraser of Allander Institute and the Poverty Alliance.

In 2024, we undertook a major project in order to align our funding priorities closely with our revised Mission. Following a pause over the summer, which led to a [significant increase in grants made](#), we have returned with improved offers through [Small and Large Grants](#), [Wee Grants and Transport Grants](#). Applications for the revised theme of [Nurturing Relationships](#) are now being assessed.

Our values of Ambition, Integrity, Connection and Equity are the compass points we will use to shape our contribution around four priority themes:

- Financial Security
- Work Pathways
- Education Pathways
- Nurturing Relationships

We are building our know-how on issues of power and justice across our work. We seek to build solutions that meet two cross-cutting objectives on [Climate Change](#) and [EDPR](#) (Equity, Diversity, Participation and Rights), in particular advancing racial justice. We have committed to a whole organisational approach to anti-racism and allyship, becoming trauma-informed and advancing meaningful participation of people with direct experience of the challenges we are here to address.

# JOB DESCRIPTION

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<b>Job title:</b>	Head of People & Corporate Services
<b>Reports to:</b>	Chief Executive Officer
<b>Direct reports:</b>	There are currently 11 staff members in three teams. You will lead and line manage the HR Manager, IT and Facilities Manager who is responsible for a team of five and The Barracks Venue Manager who is responsible for a team of three.

## ROLE PURPOSE

The Head of People and Corporate Services role is a new Senior Management Team position being created to provide a dedicated lead for our People/HR, Facilities and IT support.

We are seeking a qualified HR professional with demonstrable experience in a senior People/HR role with experience of similar IT and Facilities elements of the role. The successful candidate will be ready to lead our work in these foundational areas as we prepare for the exciting opportunities ahead in our next Plan.

## MAIN RESPONSIBILITIES

**Working with the CEO and SMT, you will:**

**Take on the senior role in leading the People/HR, IT/Facilities and Barracks functions of the Trust**

- Lead and manage the HR, IT/Facilities and The Barracks teams with three Managers (two in Glasgow, one in Stirling) through regular one to one meetings and appraisals.
- Develop processes and implement tools to facilitate effective day-to-day working.
- Take lead responsibility for development, effective implementation, clear communication and review of the Trust's People Strategy, IT Roadmap including a strong focus on Cyber Security, data management (including GDPR, approach to data analytics and responding to the risks/opportunities posed by AI) and operational/improvement plans for Robertson House and The Barracks.
- Ensure payroll changes are reported in good time to ensure the secure delivery of monthly payroll and take overall responsibility for effective contract management with external suppliers.
- Lead on a strategic workforce development approach to meet the needs of our next multi-annual Plan, with impact evaluation and ongoing improvement.
- Linked to this, drive organisational development initiatives in performance (including our appraisal system), talent management and succession planning with a strong focus on equity, diversity and inclusion aligned to our Mission and Values.
- Act as the Trust's lead for staff engagement, motivation and wellbeing, playing a proactive role in communicating with and supporting employees to deliver successfully on our next Plan.
- Lead review, development and provision of the Trust's Pay and Benefits structure.
- Develop, draft and present clear policies and procedures to the SMT and Trustees, and once agreed implement these with equity, transparency and consistency across the staff team.
- Develop, analyse and make effective use of key management information.
- Lead regular team meetings with Managers and discussions with the SMT drawing upon timely management information.
- Serve as the Data Protection Officer and the senior responsible person on both Health & Safety and Safeguarding to ensure robust arrangements are in place.
- Manage employee relations with consistency, integrity and candour, and address challenges related to performance, working closely with the SMT and if required the Trust's specialist HR advisers.

<sup>1</sup> Audit and Risk Committee (ARC) and Governance, Nominations, Remuneration and Finance Committee (GNRFC)

### **Be the Trust's lead on developing our culture**

- Work together with the CEO and Senior Managers to nurture a values-based organisational culture, expressed in positive working relationships between staff who are motivated, engaged and productive, underpinning the effective delivery of our Mission.
- Develop timely employee feedback channels, identifying priorities for improvement (including actions from the annual Staff Survey, appraisals and other sources of insight), measuring and reporting on progress.

### **Be the Trust's EDPR (Equity, Diversity, Participation and Rights) lead on SMT**

- Lead and manage the organisation's strategic approach to EDPR as a foundational element of our Mission, over and above specific funding, support and influencing programmes. Our EDPR statement can be viewed [here](#).
- Work with external networks and peers to maintain current EDPR knowledge to inform the Trust's work in this area.

### **Provide direction, expertise, guidance and leadership**

- Lead and manage analysis of capacity and demand, supporting identification of the resources needed to deliver on the Trust's Mission and Plan.
- Be the trusted advisor to the Senior Management Team, providing guidance and contributing to strategic decision-making in the delivery of our next Plan.
- Line manage three experienced Managers with distinct roles and responsibilities, maintaining an effective, collaborative working environment.
- Take lead responsibility for specific projects or programmes of work as appropriate to the functional areas within the role remit and support the wider work of The Robertson Trust where appropriate.

### **Manage risk and opportunity to provide assurance via governance**

- Manage risk and opportunity sitting within the functional areas of the role and in line with the Trust's high-level Risk Register for which the CEO is accountable.
- Work closely with the CEO and SMT members, using a data-driven approach to provide assurance by reporting to the Board of Trustees and two Committees covering Cyber Security, Health and Safety, Data Protection, Safeguarding, People Strategy and remuneration areas including the staff annual pay award.
- Identify further ways to manage risk, pursue opportunities and drive continuous improvement rooted in ongoing learning, key Internal Audit recommendations and other sources of insight.

We are searching for someone who can demonstrate Values-based leadership in practice and with a commitment to our Mission, a track-record of working on issues related to Poverty and Trauma and/or an interest, understanding or insight into how our Mission should inform ways of working rooted in our Values.

## **OUR VALUES**

### **Ambition**

We are not afraid to take on difficult issues and will take risks in pursuit of positive change. We underpin our approach with curiosity, agility and commitment to learning and continuous improvement.

### **Connection**

We work collaboratively and are informed by the knowledge and experience of those we work with. We are compassionate in our interactions and value quality relationships based on honesty, understanding and support. Our independence is a valuable asset, but we recognise that working with others makes us all stronger.

### **Integrity**

We take personal and collective responsibility for our actions and how we use our resources. We are trustworthy, consistent and open about our successes and failings. We welcome challenge and feedback in order to improve our work.

### **Equity**

The Trust is committing to a new Value of Equity in line with our EDPR statement. Work to define this will be completed in tandem with the launch of our next Plan in April 2025.

# PERSON SPECIFICATION

## KNOWLEDGE AND EXPERIENCE

- Excellent leadership, people and change management skills, focused on implementing positive change, with the ability to build effective relationships in all areas of the organisation enabling colleagues within the teams described to achieve agreed objectives.
- A CIPD Level 7 Diploma or equivalent professional experience.
- In-depth experience from leading an effective People/HR function of developing, implementing and improving initiatives to drive workforce planning, employee engagement, people and organisational development, in line with current employment law and emerging best practice.
- Experience of leading on IT, Data management and Facilities initiatives, with a good understanding of procedures and systems relevant to the role including Cyber Security, GDPR, Digital, Health and Safety, Facilities Management and Events.
- Proven ability to develop and deliver an Equity, Diversity and Inclusion plan and/or initiatives relevant to building an inclusive organisational culture.

## SKILLS AND ABILITIES

- Being strategic, creative and clear in the approach to priority-setting, decision-making, annual/quarterly planning around agreed milestones, underpinned by analysis of management information and other relevant data.
- Exceptional skills of analysis and communication (both written and verbal), with the ability to listen and respond to staff and Trustees.
- Proven ability to handle sensitive information with consistency, integrity and professionalism at all times, taking an analytical approach to resolving challenges, working closely with Managers, SMT and, where required, external specialist advisers.
- A proven ability to prepare succinct reports with clear analysis and well-developed recommendations for change and improvement.



# TERMS OF APPOINTMENT

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## SALARY

The salary for this role is £70-80,000, subject to range of skills and experience.

## LOCATION

Robertson House in Glasgow city centre with regular time spent at The Barracks Conference Centre in Stirling.

## PENSION

A 10% employer contribution or 14% if employee contribution is 7%.

## ANNUAL LEAVE

35 days including public holidays which can be taken on a flexible basis apart from the Christmas and New Year holiday when the Trust closes.

## ADDITIONAL BENEFITS

The Trust offers an attractive benefits package, which is currently undergoing review. Further details on request.



# HOW TO APPLY

We hope you will consider making an application. If you have questions about the appointment and would find it helpful to have an informal conversation, please contact [chris.milo@starfishsearch.com](mailto:chris.milo@starfishsearch.com) and we will be happy to arrange a call. To make an application, please go to <https://starfishsearch.com/jobs/robertson-trust-head-peo-cor-ser/> and click on the apply now button, with the following prepared:

- Your CV (no more than two sides).
- A supporting statement (no more than two sides) that sets out why you think this role is the right move for you and how you meet the knowledge and experience criteria. You should address the key responsibilities, experience and skills. Please also tell us about how two of our values are, or have been, particularly relevant in your work or life, outlining how you have demonstrated a commitment to them and how they would influence your approach as Head of People and Corporate Services.

We would also be grateful if you would complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

**Closing date:** Monday 24th March 2025

**Preliminary interviews:** w/c Monday 7th April 2025

**Final Panel interviews:** w/c Monday 28th April 2025

