



# Trustee Recruitment 2025

## Join us!

LionHeart is the independent charity for chartered surveyors and their families. Established in 1899, we recently marked our 125th anniversary year and are now looking to add to our Board of Trustees as we focus on our future.

We would particularly welcome applications from people with strategic audit and risk management background to broaden and complement the existing skills base within our Board and specific knowledge of charity law and governance would be a bonus.

We strive for diversity in our Board and currently have surveyors who specialise in valuation, project management, planning and development, real estate, investment and land economy, and from a range of backgrounds and with different lived experience.

But trustees do not need to be surveyors at all – in fact, we'd love to hear from partners or family members of surveyors, or those from other backgrounds.

Our trustees are appointed on a three-year term, with the option to renew.

**Trustee positions are unpaid, but any travelling expenses are reimbursed.**



## Welcome from the CEO

First of all, thank you for your interest in becoming a trustee of LionHeart. We hope that this pack will go some way to explain the very important role trustees play in our work as a charity, as well as a sense of who we are and what we're all about.

I took the reins as CEO of LionHeart a year ago and one of the things that immediately struck me as a newcomer was the great commitment and enthusiasm from both the Board of Trustees and the staff team with regard to this charity and its work.

We recently celebrated our 125th anniversary and a long, proud history of continually developing the best support and services possible for surveyors and their families.

Over the last five or six years we have seen demand for our support more than double from members of the RICS community, from the UK and across the world. The people we help tell us it makes a life-changing difference, and we are very proud of that.



Our strategy over the next few years looks to ensure that we continue to offer the same quality of service to the surveyors of today and tomorrow, while building a sustainable future and income for the charity.

We hope that you will consider becoming part of the LionHeart story and help shape the future of the support we offer.

**Phil Sparke CEO**

## Welcome from the Chair

Thank you for taking the time to consider joining LionHeart as a trustee. We are a board who care deeply about supporting our beneficiaries to receive the best support they can, in whatever form that needs to be, and we would love to welcome you to join us.

We have a proud history of supporting surveyors but we are not stuck in the past; we want to ensure that the charity thrives and supports future generations of surveyors and their families.

We are looking for new trustees to join us as we positively move forward and shape the organisation for the future.



If you are willing to share your time and skills with us, we can offer you a rewarding role that will provide you with fresh perspectives, rich discussion, and the chance to contribute to something special.

We do hope that this something that you are keen to be part of, but if you need more information please do get in touch.

**Philippa Sampson Bancroft FRICS**



## About LionHeart

LionHeart is an independent charity dedicated to supporting professionals associated with the Royal Institution of Chartered Surveyors (RICS), including current and former members, and their families.

Over our 125-year history, we have developed from our origins as a traditional benevolent fund supporting the widows and orphans of chartered surveyors into an organisation offering multi-faceted support to get people through any of life's unexpected challenges, from financial grants to health, wellbeing and work-related support.

Our commitment extends to a broad spectrum of individuals, including current and past RICS members, their partners, and dependants, from new entrants to the profession to retired or inactive surveyors, regardless of their location around the world. You can read about the difference we're making [here](#), and some of the individual stories behind the people we help [here](#).

Our overarching goal is to assist as many people as possible, as much as we can, and we pride ourselves on the personalised support we offer. One of LionHeart's core strengths is our dedicated team of experienced support officers who work closely with each person to create a tailored support package to fit their specific requirements.

We've also worked hard to expand the proactive support that we offer, so we are reaching people with relevant services before they are in crisis, and are developing strong links with corporate firms, education and training providers and other key organisations to widen awareness and engagement.

Over the last few years, LionHeart has seen a big rise in demand for support, as well as increased global reach. In the last five or six years, we've more than doubled the number of people we support, reaching thousands of surveyors in 40% more countries.

As an independent charity, our funding relies heavily on the generosity of past and present RICS members who want to help us make a difference to their fellow professionals. We do not receive any government or other external grants.

We have a friendly, hard-working team who really care about the work they do and the difference they make to the surveying community, backed up by a committed group of volunteer trustees and ambassadors.

## What are we looking for?

We are looking for people who have skills, experience and knowledge that will be of benefit to the organisation as we continue to develop how we serve the surveying community. Applicants will need to demonstrate:

- A commitment to the purpose, objects and values of the organisation
- An understanding and commitment to confidentiality and equal opportunities
- Willingness to devote necessary time and effort to prepare for and attend meetings. There are 4 board meetings a year, 1 away day plus involvement in sub committees or working groups that can add on a further 2 to 3 meetings
- Empathy and a genuine commitment to helping those in need
- Willingness to promote LionHeart and its services among your networks

## Can you bring...

### Experience and understanding

- Experience of effective team working and the ability to negotiate and compromise where necessary
- A positive attitude to and experience of formal meetings, and the ability to analyse information and challenge constructively
- An understanding of the requirements of small charities to maximise and cultivate donor income

### Knowledge and ability

- The ability to understand the difference between strategy and management, and the boundaries of the executive and governance roles
- Experience of assurance of financial reporting, governance arrangements, compliance and risk management
- Experience contributing to business planning
- Innovation, creativity, drive and enthusiasm
- An understanding of the surveying profession and of RICS as a body is advantageous but not essential



## What we offer you...

So, what's in it for you? Being a LionHeart trustee can be an extremely rewarding role, offering:

- Engagement with a social purpose to support surveyors and their families
- The ability to shape and lead a global charity
- Experience of strategic charity governance
- Professional networking



## What's it like? Hear from one of our trustees...

I was motivated to become a trustee at LionHeart as I wanted to obtain another dimension to my career as a chartered surveyor - I was compelled by the notion that I may be able to help my fellow RICS professionals who needed support in some way.

I have been a trustee since 2018, and have found it has been a really enriching experience, especially when you directly see the impact the organisation has on the people and families that we help.

I am always taken aback when I see how wide-reaching our support is at times, and knowing that we can make such a difference when it is really needed.

As lead trustee for LionHeart's support services, I now work quite closely with the team that delivers the frontline support to those people who call the LionHeart helpline, whatever they might be facing.

There is such a feeling of reward when individuals are helped, supported, and get back on track.



Caroline Legg FRICS, trustee

## Trustee duties – the small print...

Being a trustee of a registered charity is not a commitment to be undertaken lightly. Trustees have and must accept ultimate responsibility for directing the affairs of the charity, ensuring that it is solvent, well run, and delivering the charitable outcomes for which it was established.

As an independent charity, LionHeart is governed by the Board of Trustees in accordance with our charitable Articles of Association. Management of the organisation is delegated to the CEO, with whom the Board works closely to set the strategic direction for the charity and monitor progress.

Trustees should focus on strategic issues and not be tempted to get involved in the management of the organisation, although they will be required to develop an overview of the day-to-day work of the charity, including finance, service delivery, policy and organisational structure.

Trustees have terms of office of three years, which may be renewed. All trustees receive a full induction during their first six months.

### Trustees' regulatory duties:

- Ensure that LionHeart complies with charity law, and with the requirements of the Charity Commission as regulator; in particular ensure that LionHeart prepares reports on what it has achieved and Annual Returns and accounts as required by law
- Ensure that the charity does not breach any of the requirements or rules set out in its governing document and that it remains true to its charitable purpose and objects
- Ensure that the charity acts in the best interests of the people it helps
- Comply with the requirements of legislation and other regulators (if any) which govern the activities of the charity
- Act with integrity and avoid personal conflicts of interest, do not misuse charity funds or assets or profit personally from involvement
- Ensure that LionHeart is solvent and will remain so
- Use the charitable funds and assets reasonably and only in furtherance of the LionHeart's objects
- Avoid undertaking activities that might place LionHeart's endowment, funds, assets or reputation at undue risk
- Take special care when investing the funds of the charity, or when borrowing funds for the charity to use
- Use reasonable care and skill in their work as trustees, using personal skills and experience as needed, to ensure that the charity is well-run and efficient

### Further trustee duties:

- Determine the charity's mission and purpose, guard its ethos and values and protect its good name
- Monitor the charity's programmes and services, ensuring its effective and efficient management
- Develop and agree the charity's policies and strategic plan, setting overall objectives, defining goals, setting targets and evaluating performance against targets
- Ensure the financial stability of the charity, agreeing the budget and monitoring financial performance and ensure the charity has adequate resources
- Serve as an officer of the charity, chairing committees and working groups and providing assistance on new initiatives
- Appoint and support the Chief Executive, agreeing the terms and conditions of the employment and monitoring the performance of the CEO
- Review annually the performance of the charity and the trustees
- Represent the Board at professional meetings and forums as required



## Interested? How to apply...

If you would like to know more about becoming a LionHeart trustee, we'll be holding some informal online information sessions, where you'll also have the opportunity to ask questions.

You can find details of these and an application form [here](#).

Please let us know if at any stage there are any adjustments we can make to assist you accessing the application process.

Please email your completed application to [governance@lionheart.org.uk](mailto:governance@lionheart.org.uk) by Sunday 18th May 2025.

## Interviews

We expect to interview in person in London in early June. Interviews will follow a standard Q&A format and candidates will be sent the questions in advance. The questions will explore your approach to the role, your understanding of the work of LionHeart and relevant competencies.

## Questions?

If you have any questions about the form or the application process please get in touch with Kate Ellis, Governance Manager ([kellis@lionheart.org.uk](mailto:kellis@lionheart.org.uk))

**Thank you for your interest in LionHeart!**

