

Foundation Scotland

Foundation Scotland (FS) is part of a global network of 1,800 community foundations which encourage philanthropy and strengthen voluntary sectors in the countries, regions and towns in which they operate. A quality accredited, independent registered charity, Foundation Scotland is the only community foundation in Scotland.

With a national footprint, we bring independent funders together with needs and opportunities.

The Role

Purpose

Reporting to the Head of Philanthropy, the role will

- Increase the number of individuals who choose FS for philanthropic services, with an emphasis on growing long-term relationships and building invested funds.
- Increase the number of partnership firms who choose FS for philanthropic services, collectively as a firm and by partners, colleagues and their own private clients.
- Manage a portfolio of clients with development potential, ensuring the growth of transactional givers to transformational philanthropists.

Working with

- Affluent individuals and high net worth individuals.
- Partnership firms (corporate giving is managed by another FS Team).
- Community organisations with an FS endowment - open to donations from individuals.
- Dormant and redundant charitable trusts - with wind-up and asset transfer opportunities.
- Professional advisors - who deliver legal, finance/investment and accountancy services to wealthy individuals.

Main Responsibilities

1. Promotion of FS Philanthropy Services

- Network development, in particular with clients and their peers: at gatherings such as those with FS clients, prospective clients and professional advisors in attendance
- Deliver FS presentations at forums such as: in-house to partnership firms, professional advisor offices, angel investor gatherings, and advisor CPD events

2. Prospective Client - Lead Generation

- Support the identification and research of prospective clients in liaison with colleagues
- Generate leads and create opportunities to meet individuals and partnership firms, in order to promote FS services and recruit them as clients
- Create development plans for prospective clients, using a standard framework (reference: major donor 'seven steps' model in this planning)

3. Prospective Client - Development

- Follow-up on leads, liaise with colleagues to provide relevant information and formal proposals, agreements or contracts to set-up funds for new clients
- Liaise with Advisor Services' colleagues in the set-up phase, and enable an effective transition of new clients with grantmaking programme requirements

4. Philanthropy Advice and Planning Service

- Contribute to philanthropy advice and planning for a portfolio of individual and partnership firm clients and, where relevant, prospects
- Deliver Advice and Planning using a recognised programme (reference: UKCF Philanthropy Advice Framework) to include facilitation of individual, family and group planning. Support clients to establish their philanthropy rationale and objectives, methods of delivery, funding decision processes, expected outcomes and so on

5. Relationship Management

- Manage a portfolio of individuals and partnership firms who are prospects and clients
- Create opportunities for follow-up meetings and events with clients, and provide reports and other updates
- Encourage further donations to existing client funds, and develop connections with client peers who would consider FS services

Other Responsibilities

1. Planning

- Contribute to Philanthropy Team planning, which cascades from the FS Strategy.

2. Communications

External

- Contribute to externally facing activities such as educational and networking events and project visits for clients, grant programme launches and other communications, particularly those that support the development of a culture of philanthropy in Scotland
- Contribute to the creation of marketing and communications materials, such as leaflets, presentations, online copy and so on
- Contribute to using opportunities for recognising and celebrating the philanthropy of clients

Internal

- Contribute to internal news' updates for colleagues
- Support the Team Head in creating reports for colleagues and FS Board

3. Sponsorship and Donations

- Contribute to encouraging unrestricted donations, which support a shortlist of FS operational projects, and/or sponsorship of philanthropy education and profile-raising events
- Lead on development of proposals for event sponsorship and philanthropy related activities that support the development of a culture of philanthropy in Scotland

4. Line Management

- The role currently has no routine direct line management responsibilities, other than occasional task or project management with Team colleagues. However, the role carries the responsibility to deputise for the Team Head during occasional and routine absence

Person Specification

Essential

- Degree level qualification
- A minimum of five years, in an externally facing sales or major donor development environment
- Demonstrable track record of securing finance, major donations, and/or financial support for major projects
- Excellent interpersonal skills in building relationships with high net worth individuals, lead representatives of companies and senior influencers
- Ability to make effective presentations, in a range of informal and formal settings
- Ability to develop exemplary copy, including for proposals and external communications
- Ability to apply excellent judgement in management of workload, take initiative and adopt a problem-solving approach
- Strong organisational skills with excellent attention to detail
- Enthusiasm, flexibility and the ability to cope well under pressure
- Capable and proficient in the use of standard Microsoft Office applications: Word, PowerPoint, Office and Excel; and experience of CRM / fundraising databases
- Experience of working alongside management colleagues and cross-organisationally
- Ability to work flexibly, including some evening and occasional weekend work
- Eligibility to work in the UK
- Hold a UK driving licence

Desirable

- Knowledge of the third sector (voluntary, community and social enterprise sectors)
- Experience of managing volunteers, interns or staff
- Experience of professional advisor firms and networks
- Membership of a relevant sector professional body

The benefits of working for us

In addition to a sense of fulfillment and an opportunity to meet a wide range of people, FS offers the following benefits.

- A progressive pay system with benchmarked annual increases
- Life Assurance at 3 times annual salary
- Defined contribution scheme with 6% Employers' contribution
- 35 days annual leave including 10 statutory days
- Training and development opportunities
- Working pattern flexibility and homeworking opportunities
- Occasional evening working for which a TOIL system applies

The Post is graded at level 7 (of 10 grades) with a starting salary of £41,197.