

## **Foundation Scotland**

Our purpose is to support communities to shape their future with the capacity and resources to deliver it. We believe for every community to thrive, it should be resourced to match its vision and powered by transformative funding. Our ability to combine knowledge, finance and expertise helps them take action, create positive change, and deliver lasting impact in their own communities. As Scotland's community foundation, we champion this belief.

We are trusted by hundreds of communities across Scotland, and over 400 donors count on our services. More than £150 million has been distributed to charitable organisations, social enterprises, and community groups across Scotland through innovative funding programmes and social investment since the Foundation launched in 1996.

Foundation Scotland is one of 47 community foundations in the UK and part of a global network of over 1800 foundations worldwide, each inspiring change in their communities

## **The Philanthropy Team**

Foundation Scotland's Philanthropy Team supports our donors to bring their philanthropic interests to life. The team work closely with our donors to understand what matters to them and helps them to shape this passion into giving strategies and grants programmes.

The team manages many high-volume national grant programmes and a large number of smaller, more focused funds. The team works with a broad range of donors, from corporate organisations looking to give back to the communities that support them to individual and family philanthropists looking to impact the cause that means most to them. We help to design and deliver a mix of Foundation Scotland advised funds and donor-advised funding.

Building strong relationships and enabling our donors to make the most significant impact with their giving is at the heart of what we do.

## The Role

Reporting to the Head of Philanthropy & Quality, the purpose of the role is:

- To manage and support a portfolio of donors from a range of sources such as high net worth individuals, families, corporate donors, charitable Trusts, and Foundations and programmes in partnership with UK Community Foundations (UKCF)
- Provide effective philanthropy advice and develop new and increased business through the cultivation and stewardship of on-going relationships. This is achieved by supporting donors to develop their giving strategies, providing grantmaking programmes and effective ways for them to manage their giving in Scotland.
- Connect with other grantmakers and networks such as the funders' forums frontline to raise our profile, demonstrate impact and build on learning.

### Working with:

- Colleagues
- Grant Applicants & Grantees
- Volunteer Advisory Panels
- Employee panels
- Boards of Trustees
- Clients and Donors
- Third sector agencies and other funders

## Main Responsibilities

### 1. Philanthropy Advice

Engage with the UKCF Philanthropy Advice framework. Support delivery of Philanthropy advice service with a portfolio of donors and prospective donors.

### 2. Philanthropy Planning

Support donor philanthropy planning, including facilitation of individual, family, and group planning, establishing rationale, aims, objectives, methods of delivery, decision-making processes and expected outcomes.

### **3. Grant Programme Design**

Contribute to the design of programmes for donors, including planning, research, aims, methods for promotion/sourcing quality applications, establishing decision processes, monitoring and evaluation.

### **4. Grant Programme Delivery**

Deliver grant programmes for donors, including promotion/source quality applications, manage assessment processes, commission proposals, manage decision-making processes, applicant feedback, trigger grant payments and undertake grantee management.

### **5. Grant Programme Delivery: Decision Processes**

Prepare batches of assessment reports and recommendations for internal or donor decision-making panels, attend these as required and provide training and administration as appropriate.

### **6. Grant Programme Delivery: Ongoing Processes**

Provide responses and feedback to applicants, trigger grant award transactions. Manage monitoring procedures and evaluation processes. Manage any larger or multi-year grant awards as required. Compile a range of donor reports as required.

### **7. Increased Engagement and Philanthropy Development**

- Support delivery of a range of activities and programmes to strengthen the value of philanthropy for donors, such as: managing project visits, showcasing attractive yet under-funded projects, connecting donors with peer donors, and supporting learning events/round tables.
- Support in-company or family grant decision making/panels.
- Source stories for PR, invite donors to Foundation Scotland events, research and report on projects funded, impact and learning.
- Remain aware and respond to donor wealth events and significant life events.
- Engage with OSCR process for windup/transfer and reorganisation of independent trusts to Foundation Scotland.

## **8 Impact Reporting**

Support the design and delivery of monitoring and evaluation for programmes, analyse data, and gather learning from Foundation programmes to create impact reports for donors and Foundation Scotland learning.

## **9. External Assessor Support – Coordination**

Develop and deliver systems to recruit, induct and train /develop grant assessments, for external assessors. Monitor performance and take action as appropriate to remedy issues and /or further develop their capacity.

## **10. Communications**

Support communication activities relating to donor activity such as:

- Sourcing relevant project stories for use by communications staff
- Writing cases studies about donors or grantees
- Attending donor engagement, and learning events, supporting Foundation Scotland events and encouraging donors to attend
- Engaging with marketing and PR as requested by the Philanthropy team and other relevant Foundation Scotland staff.

## **Shared Responsibilities**

### **1. Planning: Team**

Contribute to a range of team activities, including establishing team plans, monitoring progress against targets, creating a range of reports for internal purposes and for external donors, and providing feedback on the team and business plan.

### **2. Evaluation, Impact and Learning**

Contribute to the design of monitoring and evaluation programmes, analysis of data, gathering learning from Foundation programmes and from policy/sector reviews, creating a range of impact reports and learning for donor programmes and Foundation operations.

**3. Professional Development**

Engage in opportunities to develop skills, experience and knowledge, focussed on the individual role profile and responsibilities, and agreed with the line manager. Engage in any Foundation review of training and professional development.

**4. Profile**

Where appropriate, raise the profile of the Foundation through the delivery of presentations to relevant audiences, attendance at relevant forums and by engagement in relevant networks and with agreed partners.

## Person Specification

### Essential

- A minimum of three years' experience in donor service, grantmaking, social sector, relationship management or related environments
- An understanding of donor (donor) development, stewardship, and communications in the business world and/or third sector
- Excellent interpersonal skills in building relationships with senior level individuals, lead representatives of companies and community / charity representatives
- Knowledge or experience of developing programme plans with individuals or companies
- Knowledge or experience in developing grant programmes (including aspects of aims, criteria, promotional / sourcing plans, assessment and decision processes, monitoring/evaluation and impact/learning)
- Strong analytical skills in assessment of proposals / applications
- Strong written skills, applied particularly in report formats and short research projects
- Experience of supporting small scale events
- Capable in the use of standard Microsoft Office applications: Word, PowerPoint and Excel
- Experience of CRM systems
- Ability to work independently, to 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
- Eligibility to work in the UK
- UK driving licence

### Desirable

- Membership of relevant sector professional body
- Experience of using donor relationship management databases e.g. Salesforce, Access, Raisers Edge or similar
- Experience of development and communications