Philanthropy Manager

Reports to	Head of Philanthropy and Quality
Direct reports	Fund Advisers, Grants Officers and other allocated team members
Scope	Philanthropy advice, donor relationships, stewardship and grant-making across the allocated portfolio, principally for individuals and families, with trusts, foundations and corporate donors as required
Authority	Manages allocated funds, resources and budgets within agreed policies and delegated authority

Role purpose

The Philanthropy Manager will manage Foundation Scotland's philanthropy portfolio and team, combining high-quality donor relationships and advice with effective grant-making and fund delivery. Working to the Head of Philanthropy and Quality, the postholder will translate donor ambitions into practical giving plans that respond to community needs and opportunities. Through personal casework and the management and development of team members, the role will ensure that funds are well managed, grants are delivered to agreed standards and donors understand and engage with the impact of their giving. The postholder will connect opportunities across funding channels, apply proportionate and equitable funding practice, and work with colleagues to improve donor stewardship, delivery and learning.

Summary of key responsibilities

- **Philanthropy advice and fund design:** Translate donor ambitions into practical giving plans and fund programmes informed by community needs and opportunities.
- **Grant-making and fund delivery:** Manage the full grant-making cycle, undertaking delivery directly and through team members.
- **Donor relationships and stewardship:** Oversee donor relationships and provide a coordinated, personalised and meaningful donor experience.
- **Funding quality, governance and risk:** Apply agreed standards, controls and delegated authority, addressing concerns and escalating material risks.
- **Community-informed funding and collaborative impact:** Embed community insight and equitable practice, connecting cross-team funding channels to increase impact.
- **Donor commitments, impact and learning:** Fulfil commitments and reporting requirements, using evidence and feedback to improve funding practice.
- **Team and portfolio management:** Manage and develop the team, embed the Philanthropy Competence Framework and manage performance and resources.
- **Collaboration and continuous improvement:** Support donor stewardship strategy with Development, reporting with Communications and shared improvements across Funding teams.

Key responsibilities

1 Philanthropy advice and fund design

- Manage the provision of philanthropy advice to individuals, families and other donors, helping them clarify their ambitions and understand giving strategy options, grant-making approaches and funding opportunities.
- Develop and review giving plans and fund frameworks with donors and colleagues, establish clear aims, eligibility, assessment, decision-making and reporting arrangements within agreed fund terms.
- Ensure proposed approaches reflect community needs, delivery capacity, financial viability and risk, working in-team, with Development and other colleagues on practical arrangements for new or revised funds.

2 Grant-making and fund delivery

- Provide support on the full grant-making cycle across the allocated portfolio, from promotion and applicant support through assessment, recommendations, decisions, grant administration, monitoring, review and closure.
- Undertake grant-making personally and allocate delivery to team members, retaining oversight of quality, timeliness and clear ownership; make decisions within delegated authority and support donor or panel decisions within agreed governance arrangements.
- Plan funding rounds, distribution schedules and workloads, coordinate grant payments with Finance and provide responsive support to applicants and grant recipients; resolve delivery issues and escalate where commitments are at risk.

3 Donor relationships and stewardship

- Oversee the team's donor relationships and personally manage selected significant or complex relationships, building trust through informed advice, reliable service and an understanding of donor interests.
- Coordinate tailored stewardship plans, contact and engagement opportunities, agreeing responsibilities with Development and relevant colleagues so donors receive a consistent experience and remain connected to their giving.
- Support team members to respond to changing donor needs and identify opportunities for deeper engagement, retention, peer introductions and increased giving, coordinating follow-up with Development.

4 Funding quality, governance and risk

- Apply the standards established by the Head of Philanthropy and Quality, maintaining proportionate due diligence, consistent assessment, reliable records, management of conflicts of interest and decisions within delegated authority.
- Work with Finance and relevant colleagues to maintain financial controls, accurate fund information and appropriate responses to safeguarding, fraud and other funding risks.
- Address service concerns, complaints and quality issues within the role's remit, escalating material risks and decisions beyond delegated authority; implement corrective action and share learning.

5 Community-informed funding and collaborative impact

- Work with a range of colleagues to bring community insight, lived experience and evidence into philanthropy advice, fund design and grant-making decisions.
- Identify and develop opportunities to coordinate or combine resources across donors, funds and funding channels, including grant and social investment opportunities with specialist colleagues where appropriate, to increase impact within agreed fund purposes and terms.
- Apply accessible, proportionate and equitable funding processes and Open and Trusting principles; support community participation where appropriate and use applicant and grant recipient feedback to address barriers.

6 Donor commitments, impact and learning

- Ensure funds fulfil agreed donor commitments, fund terms, anticipated outcomes and reporting requirements; monitor progress and address or escalate gaps in delivery.
- Oversee proportionate monitoring, evaluation and high-quality donor reporting, ensuring reliable evidence connects the use of funds with community outcomes and meets organisational standards.
- Use evidence and feedback from donors, applicants, grant recipients and colleagues to review giving plans, improve programmes and contribute to organisational learning and impact reporting.

7 Team and portfolio management

- Manage and develop Fund Advisers, Grants Officers and other team members, setting clear objectives, providing supervision and feedback, and embedding the Philanthropy Competence Framework in professional development and performance review.
- Allocate portfolios and workloads, manage delegated resources and budgets, and anticipate capacity and capability needs so that commitments can be met and service quality maintained.
- Maintain an accurate view of portfolio delivery, performance, expenditure and risk; provide timely information and assurance to the Head of Philanthropy and Quality and take action where performance falls short.

8 Collaboration and continuous improvement

Work with Development to support the development and improvement of donor stewardship strategy, agree clear handovers and donor responsibilities, and progress opportunities for renewed or increased giving.

- Work with Communications on clear and accessible donor reporting, and with colleagues across funding teams to share expertise, coordinate practice and implement improvements.
- Use CRM data, donor insight and delivery evidence to assess service effectiveness, including donor engagement, retention and satisfaction; recommend and implement improvements to systems, processes and practice.

Person specification

Essential criteria

Professional experience and expertise

- Substantial experience of working directly with philanthropists, particularly major individual donors, building trusted relationships and supporting them to develop and achieve their giving ambitions.
- A strong track record of providing personalised philanthropy advice and stewardship, understanding donors' motivations and interests, navigating sensitive or complex conversations, and sustaining and deepening their engagement.
- Ability to translate philanthropic ambitions into practical giving plans, connecting donor interests with community needs and opportunities for meaningful impact.
- Understanding of grant-making and fund management, or the ability and commitment to develop this expertise, including assessment, decision-making, monitoring and reporting. Direct grant-making experience is valuable but secondary to a strong track record of working with philanthropists.
- Awareness of the governance and responsibilities associated with charitable funding, and a commitment to developing and applying proportionate due diligence, sound financial controls and accessible, equitable funding practice.

Management and collaboration

- Experience of managing and developing staff, setting objectives, allocating workloads and supporting performance and professional development.
- Ability to manage a portfolio of commitments, budgets, resources and risks, prioritising effectively and maintaining reliable service standards.
- Experience of working across teams, establishing clear responsibilities and contributing to improvements in services and practice.

Skills and attributes

- Strong interpersonal and communication skills, with the ability to build trust, provide clear advice and handle sensitive or complex relationships.
- Sound judgement and analytical skills, including the ability to assess funding proposals, interpret evidence and recognise when to escalate concerns.
- Strong organisational skills and attention to detail, with the ability to manage competing priorities and produce clear, accurate reports.
- Confidence using CRM systems, digital tools, and performance information to manage relationships, funding activity and service improvement.
- Commitment to Foundation Scotland's values, vision, purpose and ambition.

Desirable criteria

- Experience of supporting complex philanthropic arrangements, such as family giving, intergenerational involvement, legacy gifts or endowed funds.
- Practical experience of grant-making and fund management, including assessment, funding recommendations, monitoring and reporting.
- Experience within a community foundation, charitable foundation or comparable organisation connecting philanthropy with community needs, and using community-informed, evidence-led approaches.
- Relevant professional qualification, training or membership in philanthropy, grant-making, management or a related field.