



Recruitment Pack

Director of Income Generation

September 2023

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1. Introduction

We are delighted that you are interested in applying for the role of Director of Income Generation with the Community Foundation for NI.

Since we were established in 1979, we have awarded millions of pounds in grant funding to local charities and community groups. We have also developed numerous programmes to support local communities build their capacity and sustainability. We have encouraged local philanthropy and facilitated donors with their giving, working in partnership with a range of donors, trusts, foundations and government to improve the lives of people in NI.

We are excited to have just started the first year of our new three-year strategy. The Director of Income Generation will be a key part of our team, leading on income generation to help us achieve our ambitious objectives between now and March 2026 and beyond.

We are a great employer and hope that you will get a picture of what it would be like to work for the Foundation, through this pack.

We will be delighted to receive your completed application by the closing date of **12.00 noon on Wednesday 11 October 2023.**

Yours sincerely

Roisin Wood

Chief Executive



About Community Foundation for NI

2.1 Background

The Community Foundation for NI is a local, independent charitable trust that provides grants and support to local communities in Northern Ireland.

We have offices in Belfast and Derry-Londonderry, although since Covid, we have operated a hybrid working policy for all staff.

We dedicated a lot of time in 2022/23 developing our new strategy, covering the three years from April 2023 to March 2026. As part of this process, we changed our mission, vision, values and behaviours.

2.2 Vision

Our vision is a fair and equitable society for everyone.

2.3 Mission

Our mission is working hand in hand with communities to build a better future.

2.4 Strategic Priorities

Over the next 3 years we will focus on:

- Engaging and supporting communities;
- Driving Equity, Diversity and Inclusion;
- Improving Well-being

2.5 Values

Ambitious	<p>Having or showing a strong desire and determination to succeed. Not doing more but doing it smarter and better in a way that puts all communities at the heart of our work.</p> <p><i>'Success is peace of mind which is a direct result of self-satisfaction in knowing you did your best to become the best you are capable of becoming'</i></p> <p>John R Wooden</p>
Passionate	<p>Having or showing great excitement and interest – in our work, our communities, our team and our impact on Northern Ireland society.</p> <p><i>'What lies behind us and what lies before us are tiny matters compared to what lies within us'</i></p> <p>Ralph Waldo Emerson</p>
Integrity	<p>Adherence to moral and ethical principles.</p> <p><i>'It takes courage to create a meaningful life of integrity. It also requires good company. And practice'</i></p> <p>Shelly Francis</p>

2.6 Behaviours

<p>Active listening:</p> <p>listen, be attentive, reflect, clarify, don't interrupt</p>	<p>Non-judgmental:</p> <p>engaging without judgement, criticism or personal bias</p>	<p>Collaborative:</p> <p>working positively together towards a shared goal</p>
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We support our staff and Trustees to live our values and behaviours and work together to improve the lives of people in Northern Ireland.

3. Why work for us?

The Community Foundation's aim is to be the best charity to work for in Northern Ireland. We feel we have a great staff team. We treat our staff well, providing excellent salaries and benefits, prioritising staff health and wellbeing, encouraging hybrid working and supporting staff development and growth.

For more details on Employee Benefits, please see Section 9.

4. The role of Director of Income Generation

The Director of Income Generation will be a key part of our team, leading on income generation to help us achieve our ambitious objectives from now until March 2026 and beyond. This is an exciting time to join the Community Foundation for NI – we have just launched our new strategy (please refer to section 10) covering the period April 2023 to March 2026, with an updated mission, vision and values. We are focusing on a small number of strategic priorities based on what communities have told us and what is also important to us:

- Engaging and Supporting Communities;
- Driving diversity, equity and inclusion;
- Improving wellbeing

Our work is based around two main areas:

- making grants to local charities and community groups to enable them to support their beneficiaries across a wide range of themes and issues and
- developing, managing and delivering programmes which address specific social issues that we have identified such as housing and homelessness and human rights. Programmes can include training, mentoring, capacity building as well as grants.

We are fortunate to be in a strong financial position, with some long-term, medium-term and short-term revenue streams already secured. We have (invested) endowment funds of £20 million which provide returns annually to support some of our core costs and grant-making.

However, our plans are ambitious, and we have identified a shortfall of £12.5 million of new income to be raised over the next three years. We have already developed an income generation plan which sets out how we plan to raise the funds. A summary of the plan is shown below.

What do we need?

- Funding for 3 new programmes;
- Funding for grant-making funds to support our strategic issues;
- Some funding towards our core costs.

How much do we need?

£12.5 million over three years

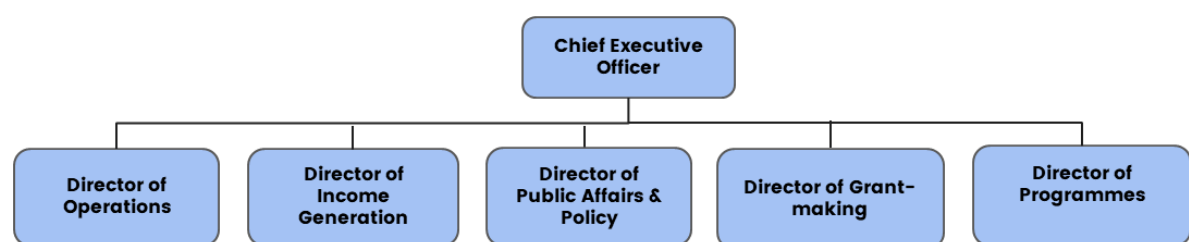
Where might the funds come from?

- Charities, Trusts and Foundations;
- Government;
- Corporate donors;
- Individual donors.

What resources do we have to help us to raise the income?

- Experienced, skilled and passionate staff;
- Our impact and the stories from our grantees and beneficiaries;
- Committed trustees and ambassadors willing to open doors;
- Well established partnerships and relationships with existing donors and stakeholders;
- Our website, social media and publications;
- Events and conferences.

Senior Team



While the Director of Income Generation will lead on the overall income generation plan, the Senior Management Team have collective responsibility for income generation, across their different Directorates. We see income generation as a collaborative exercise.

In addition to the overall income target, separate income targets have been set for individual Directors. Achievement of the income targets will require collaborative and supportive working across all Directorates. The Income

Generation Plan will be delivered by the Senior Management Team through excellent communication, team working, collaboration and strong relationships.

As well as raising income for our own priorities, we also facilitate donors' giving, by enabling them to set up their own donor-advised funds with us and make grants to support a range of issues, which while donor-advised, are still aligned to our strategic priorities.

The Job description below sets out the role in more detail, while the Person Specification sets out our requirements for the role. More information about the Foundation and our people can also be found on our website.

5. Job Description

Job Title:	Director of Income Generation
Responsible to:	Chief Executive
Responsible for:	Income Generation Manager and Administration Officer
Hours:	35 per week – the post holder will be expected to work flexibly to meet the needs of the post – regular evening/weekend work will be required
Salary:	NJC Scale 51-54 (£58,095 – £61,369) – it is our normal practice for new employees to start on the first point of the scale
Duration:	Permanent
Location:	The Foundation has a hybrid working approach and therefore the place of work will include both the office location and home-based working. This post will also require the post-holder to regularly work away from the office, across NI and occasionally outside NI. Travel to Europe and the US may also be required occasionally.

The Community Foundation for Northern Ireland is an independent grant-making trust. Our vision is for a fair and equitable society for everyone, working hand in hand with communities to build a better future. We are passionate and ambitious about what we do, and we act with integrity.

About You:

You will share our values of ambition, passion and integrity and are committed to positive social change and improving the lives of people in Northern Ireland. You will demonstrate our behaviours of active listening, non-judgemental and collaboration both internally and externally. You are self-aware, caring and open, with a high level of emotional intelligence, which enables you to build strong and meaningful relationships, defuse conflict, inspire and motivate those around you and work collaboratively and harmoniously with the senior management team.

You will be able to lead and inspire the wider staff team, our Trustees, our ambassadors and new and existing donors. You will have excellent communication skills, with the ability to build strong relationships both internally and externally, talk about the work of the Foundation and prepare clear and succinct written information.

You will also have a proven track record in cost effective income generation for a charity, with the knowledge and experience of developing, delivering, achieving and reporting on an income generation plan with annual targets of over £2 million.

Summary of the role:

As a member of the Senior Management Team (SMT) of the Community Foundation, you will contribute to the overall strategic direction of the work of the Foundation. As Director of Income Generation, you will lead the work of the Foundation in our fundraising through the development and successful delivery of the income generation strategy.

The Community Foundation's fundraising will include:

- seeking funding from trusts, foundations, corporates, high net worth individuals, legacies and government, generating both endowed (long-term) and short-term revenue funding;
- facilitating donors to establish donor advised funds which are aligned to their charitable interests and to the Community Foundation's strategic priorities.

The Director of Income Generation is responsible for leading on the development and successful delivery of the Income Generation plan for the Community Foundation. You are expected to do this through your inspirational and purposeful management of your team and by working closely with your peers on the SMT, who have a collective responsibility for income generation. Your role, in collaboration with the SMT is to secure income to support our grant making and programmes and ensure the sustainability of the Community Foundation.

Main Responsibilities:

Currently, the main responsibilities of this role include:

Strategy and Leadership

- Working collaboratively with the CEO and other Directorates, in line with our agreed ways of working, sharing knowledge and expertise to provide leadership, contributing to and influencing the strategic direction of the organisation, whilst maintaining the culture and values of the Foundation;
- Leading, managing, developing and supporting a strong, high performing team where individuals are working to clear targets which are in line with the vision, mission, values and behaviours of the Foundation;
- Developing and maintaining robust financial controls, risk management systems, budget management and sound administrative processes and procedures to ensure the effective running of the Income Generation Directorate and to report on its performance;

Income Generation

- Leading on the development and successful delivery of the Income Generation plan for the Community Foundation. You will do this by working collaboratively with your team and SMT colleagues throughout the income generation process, from prospecting to securing new income for the Foundation to support all areas of our work;
- Working with SMT colleagues to develop and initiate new programmes, funds and services and to develop cases for support;
- Building relationships with new or prospective donors, including cultivating, making proposals, negotiating agreements and planning stewardship of new donors;
- Encouraging Trust Transfers by providing support to trusts that are dormant or wish to close, enabling them to transfer their charitable funds to the Community Foundation;
- Working with professional advisors as a potential route to donors and legacies;
- Developing the legacy engagement programme to grow legacy pledges and future income;
- Developing and supporting our ambassador network to promote and champion the Foundation and open doors to new opportunities;
- Building relationships and partnerships which increase the income-raising potential of the Foundation.

Donor Management and Stewardship:

- Leading a programme of active, planned stewardship of existing relationships (and new ones as they come on board), working hard to retain, build and broaden relationships with donors;
- Ensuring that due diligence is carried out on all new donors, in line with the Donations Acceptance Policy;
- Preparing Business Cases for new funds and programmes and presenting these to Trustees for approval;
- Negotiating and finalising fund agreements and contracts with new donors;
- Working in partnership with the Grants, Programmes and Operations Directorates to transition new donors into the Foundation;
- Providing excellent donor care and stewardship services to new and potential donors, in line with agreed donor care and stewardship procedures;
- Leading on income generation events designed to cultivate new prospects;
- Developing and supporting our donor network through events and materials;

Reporting and Compliance:

- Ensuring the accurate and timely recording of data relating to income generation in Sharepoint and on our database, Salesforce;
- Monitoring the Income Generation Team's Implementation and Lean Review Plans to ensure targets are achieved;
- Preparing clear and informative reports and analysis on income generation to the CEO, SMT and Trustees;
- Attending the Finance and Resources Committee and Board meetings to present Income Generation Reports and respond to queries;
- Ensuring best practice and compliance with GDPR and fund-raising regulations and guidelines.

Other:

You will also be expected to:

- attend training courses and events as required and share learning with other staff and the trustees, as relevant;
- contribute towards other aspects of the Foundation's work as required. As this is a senior post there will be the expectation and opportunity for you to be involved across many areas of the Foundation's work.

General:

All staff are required to:

- carry out their work in accordance with the organisational culture, values and behaviours;
- be aware of, understand and comply with all the Foundations policies and procedures;
- manage their workload effectively while ensuring the efficient use of office resources and in particular Microsoft Office and the Foundation's database, Salesforce;
- always maintain the confidentiality of information received;
- carry out such other appropriate tasks and work as requested;
- attend and participate in staff meetings, team meetings and relevant training;
- attend some of the Foundation events each year;
- Identify improvements and efficiencies – we have a lean approach to our operations and are always trying to improve.

This Job Description is not intended to comprehensively list the responsibilities of the post, but to indicate the main areas which at this stage appear to be the essential requirements of the post.

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6. Director of Income Generation – Person Specification

	ESSENTIAL CRITERIA	
EXPERIENCE	<p>A minimum of 3 years' experience (at Senior Manager/Director level) in an Income Generation role within a charity, which includes significant experience in:</p> <ul style="list-style-type: none"> (i) Line managing, leading, supporting and developing a high performing team (ii) Developing, managing and delivering a successful income generation strategy (iii) A proven track record in securing large donations and responsibility for securing at least £2 million of income annually (iv) A proven track record in stewarding long term relationships with donors, building their value over time (v) Developing and implementing internal controls, systems, processes and procedures to support the effective running of the income generation department, including: <ul style="list-style-type: none"> • Income management; • risk management; • budget management; • income generation; • donor care and stewardship; • reporting (vi) Building strong relationships with staff and key stakeholders (both internal and external) 	Application form Presentation & interview

ESSENTIAL SKILLS AND KNOWLEDGE	Excellent communication skills including the ability to communicate orally and in writing, clearly and concisely.	Application form Presentation & interview
	Excellent presentation skills including providing persuasive and effective oral and written presentations to potential donors.	Presentation & interview
	Excellent organisational and time management skills, with the ability to deliver on high volumes of work, to tight deadlines.	Presentation & interview
	The ability to record, manage and analyse data to provide reports to SMT, Trustees and stakeholders.	Presentation & interview
	A working knowledge of MS Office plus strong IT skills including the ability to use IT systems to implement, manage and monitor processes and workloads.	Application Form
	Emotionally intelligent, flexible and focused	
	Knowledge of charity governance, charity giving, fund raising regulations and the issues facing the voluntary and community sector in NI.	Interview Interview

OTHER REQUIREMENTS	Committed to the Foundation's vision, mission, values and behaviours. (Values) Ambitious, Passionate and Integrity (Behaviours) Active listening, Non-Judgmental, Collaborative	Application form & Interview
	Committed to Diversity, Equity and Inclusion and to working with a diverse range of people and communities across Northern Ireland.	Application form & Interview
	Attendance at both daytime and evening events and meetings across Northern Ireland, the UK and Ireland. Travel to Europe and the US may also be required occasionally.	Application form
	DESIRABLE CRITERIA	
QUALIFICATION	A relevant degree, leadership or fund-raising qualification	Application form

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7. How to apply and recruitment schedule

Application Forms must be completed in full, signed (electronic signature accepted) and returned by email to Lisa McCann at lmccann@communityfoundationni.org

The closing date for applications is **12 noon on Wednesday 11 October 2023**. Applications received after the closing date will not be considered. CV's will not be accepted.

At this stage, the draft recruitment schedule is as follows:

Closing Date – 11 October at 12.00 noon

Shortlisting – week beginning 16 October

Shortlisting decisions notified to candidates week beginning 16 October

On-line assessment to be carried out – times to be arranged with shortlisted candidates

Interviews to be held on Thursday 2 November

8. Summary of Main Terms and Conditions

This is a full-time permanent position, subject to a probationary period of up to 6 months.

Working hours are 35 per week, exclusive of meal breaks. Normal hours for this post are Monday to Friday 9.00am – 5.00pm. However, the post-holder will be required to be flexible and work unsocial hours on a regular basis, to meet the needs of the post. We offer flexible working arrangements, subject to business needs.

Holidays are 25 days annually (plus statutory days) pro-rata.

Staff also get a day off for their birthday each year.

The post-holder may be eligible for membership of the Foundation's Pension Scheme.

The post-holder may be entitled to membership of the Foundation's Health Shield Employee Benefits Scheme.

The post-holder will not be entitled to free on-site parking at our office. However, there is a carpark on site which staff can pay to use at their own expense.

The Community Foundation for Northern Ireland is an equal opportunities employer. We welcome applications from all suitably qualified persons. However, as men and members of minoritised communities are currently under-represented in our workforce, we would particularly welcome applications from these sections of the community.

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9. Employee Benefits and Wellbeing Benefits

We offer all employees a rewarding career and value all that they can bring to the role to help us deliver our vision and mission. We want to have the best people working at the Community Foundation, staff who are passionate and ambitious about our work and who act with integrity. We care about our staff and treat them well. In addition to attractive and competitive salaries, we offer all employees a range of benefits, including our core employee benefits and more recently, we have added our wellbeing benefits. We hope that our benefits show our staff that we put their wellbeing first, to ensure that they are healthy, happy and motivated at work, have a good work-life balance and can perform at their best.

Core Employee Benefits

- 25 days Annual leave, rising to 30 days after 10 years' service
- 11 Statutory/Public holidays
- 2 Customary days
- *(All leave is pro-rata for part-time staff)*
- Occupational defined contribution pension scheme (salary sacrifice)
- Occupational sick pay scheme
- Enhanced maternity, paternity and adoption leave
- Hybrid working arrangements
- Working from Home Allowance
- Flexible working
- On-line staff training portal
- Financial support and time off for training and development

Health and Wellbeing

- Permanent ill-health Insurance
- Life Insurance
- Health cash plan
- Health checks
- Staff wellbeing training, activities and events
- Cycle to work scheme
- Volunteering Leave

Reward and Recognition

- Birthday leave and birthday gift
- Recognition awards linked to values and behaviours
- Rewards linked to financial wellbeing
- Acts of Kindness Rewards
- Office Wellness Hub, with wellbeing resources

10. Strategy 2023-26

Please find below a link to our Strategic Plan:

[Community-Foundation-Strategy-2023-26-1.pdf \(communityfoundationni.org\)](#)