



Recruitment Pack

Income Generation Manager

September 2023

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1. Introduction

We are delighted that you are interested in applying for the role of Income Generation Manager 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 Income Generation Manager will work alongside the Director of Income Generation and the wider team, 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

Active listening: listen, be attentive, reflect, clarify, don't interrupt	Non-judgmental: engaging without judgement, criticism or personal bias	Collaborative: working positively together towards a shared goal
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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. Job Description

Job title:	Income Generation Manager
Responsible to:	Director of Income Generation
Hours:	35 per week
Salary:	NJC Points 32-35 (£38,296- £41,496) - it is our normal practice for new employees to start on the first point of the scale
Duration:	Permanent
Location:	The Foundation currently has a hybrid working approach and therefore your place of work will include both the office location and home-based working. You will be expected to travel extensively across Northern Ireland and when necessary, in the Republic of Ireland, the UK mainland and occasionally, internationally.

Summary

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 will have the skills and qualities to build strong and meaningful relationships, and a commitment to working collaboratively and harmoniously with the Income Generation team and the wider staff team.

Summary of the role:

The Income Generation Manager will report to the Director of Income Generation, assisting and supporting them to successfully achieve the Foundation's income generation targets by:

- 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.

Main duties and responsibilities:

- € Work collaboratively and in line with the Foundation's policies and income generation procedures, to secure new income for the Foundation to support all areas of our work;
- € Secure new income against agreed targets from a range of sources, to ensure the successful delivery of the income generation plan;
- € Develop and manage campaigns to secure new income for specific purposes;
- € Develop cases for support, write funding applications and bids for institutional funding;
- € Provide reports on income generated against agreed targets, for the Director of Income Generation, Senior Management Team and Trustees;
- € Assist with securing trust transfers, and support trusts that are dormant or closing with the trust transfer process;
- € Develop and support plans for engaging with professional advisors, ensuring they are well informed about the Foundation and our services for donors;
- € Ensure the accurate and timely recording of all data relating to income generation and opportunity management, on Sharepoint and on our Salesforce database;
- € Generate progress reports and updates on opportunity management;
- € Ensure all activities comply with the Fundraising Regulator and the Institute of Fundraising Codes of Practices, as well as best practice and legal requirements relating to income generation;

Donor Management and Stewardship

- Research and carry out due diligence on prospects and potential donors and log on our database in line with the Foundation's policies and data protection legislation;
- Prepare business cases for new funds and programmes, for approval by Trustees;
- Ensure that all donations received are in line with the Foundation's Donations Acceptance Policy;
- Work closely with colleagues to negotiate and agree contracts and fund agreements with donors;
- Work in partnership with the Grants, Programmes and Operations Teams to transition new donors into the Foundation;
- Provide excellent donor care and stewardship services to new and potential donors, in line with agreed donor care and stewardship procedures;
- Build relationships and work with professional advisors and existing donors to encourage legacy donations;
- Plan and oversee events, project visits and other networking opportunities for prospective donors;
- Keep up to date on trends in income generation, including issues relating to tax-effective giving;
- Assist with supporting the donor network through events and materials;
- Undertake any other reasonable responsibilities as directed by the Director of Income Generation.

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.

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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5. Personnel Specification

ESSENTIAL REQUIREMENTS

FACTORS	DETAILS	ASSESSED
Experience	<p>(i) Three years' relevant work experience in a similar role in a charity, where the main purpose of the role was income generation or fundraising;</p> <p>(ii) Proven track record over at least three years of achieving income generation targets;</p> <p>(iii) Experienced and competent in developing cases for support, writing funding applications and bidding for institutional funding;</p> <p>(iv) Personal experience of successfully growing, cultivating, stewarding and/or advising major gifts or investments from private individuals, families or businesses;</p> <p>(v) Experience of building strong relationships with a diverse range of stakeholders, internally and externally;</p>	Application form
Knowledge and Skills	<p>Knowledge and understanding of donor care and stewardship processes;</p> <p>Knowledge of charitable giving, charitable governance and fundraising regulations;</p> <p>Excellent written and verbal communication skills;</p>	<p>Interview</p> <p>Interview</p>

	<p>Presentation skills and confidence in public speaking and an ability to persuade and negotiate effectively;</p> <p>Organisational and time management skills and the ability to meet deadlines;</p> <p>Strong IT skills, including a working knowledge of MS Office and the ability to produce reports using IT systems.</p>	<p>Presentation and Interview</p> <p>Presentation and Interview</p> <p>Presentation and Interview</p> <p>Application Form</p>
Other requirements	<p>Commitment to the Foundation's vision, mission and values and behaviours: Values – Ambition, Passion and Integrity Behaviours – Active Listening, non-judgemental and collaborative;</p> <p>Committed to Diversity, Equity and Inclusion and to working with a diverse range of people and communities across Northern Ireland;</p> <p>Attendance at both daytime and evening events across Northern Ireland, the UK and Ireland. Travel to Europe and the US may also be required occasionally.</p>	<p>Application Form and Interview</p> <p>Application form and interview</p> <p>Application Form</p>
DESIRABLE REQUIREMENTS		
Qualifications	A relevant degree or fund-raising qualification	Application Form

Knowledge and Experience	Experience of working with professional advisors, to encourage charitable giving.	Application form
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6. How to apply

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.

7. 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.

8. 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

9. Strategy 2023-26

Please find below a link to our Strategic Plan:

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