



**Community
Foundation**

Tyne & Wear and Northumberland



Chief Philanthropy
Officer



Starfish

Introduction from the Chief Executive

Dear candidate,

Thank you for your interest in becoming the Chief Philanthropy Officer at Community Foundation Tyne & Wear and Northumberland.

North East England is a fantastic place, with a warm welcome, vibrant culture and beautiful landscape. But we face challenges, with poverty and inequality likely to be worsened by the long-term effects of the Coronavirus pandemic.

Our region has an amazing 1000-year tradition of philanthropy. Today, over 7,000 local charities and community organisations play a vital role in our area's civil society. They are the glue that brings people and places together, and the catalyst for millions of hours of time given by an army of volunteers. The majority are under the radar, doing brilliant work with modest resources. But most philanthropic money goes to big, national, household-name charities. While there's no shortage of people and businesses that want to make a difference locally, many struggle to know how and where to start.

That's where the Community Foundation comes in. For over thirty years, we've matched generous people with causes on their doorstep and, as a result, distributed over £150 million in funding for local organisations. Five years ago, we created the post of Chief Philanthropy Officer to drive the continued growth of more and better philanthropy for our area. With the post-holder now moving on to become a CEO themselves, we are looking for an exceptional person to succeed them and lead key elements of our strategy for donor cultivation, engagement and stewardship, alongside becoming one of my two deputies.

As we look ahead to a post-pandemic world, we know our work is needed more than ever. Brilliant local charities and community organisations will face what's ahead with our backing and that of our generous donors. If you have the enthusiasm, skills and knowledge to help us on the next stage of this journey as the new Chief Philanthropy Officer and deputy CEO of the UK's leading community foundation, I hope to hear from you.

Rob Williamson DL, CEO



Who are we?

We are an independent charity, the most successful of 47 community foundations in the UK and the largest, outside north America, of nearly 2,000 across the globe. Over 30-plus years, we've built an endowment of c. £100 million as a community asset to benefit our area and its people now and for generations to come.

Our mission is to grow giving and philanthropy by matching generous people with important community causes. Every year we award millions of pounds in grants through funds set up by our donors. Tyne & Wear and Northumberland is our focus, but some work extends to other parts of northern England and, occasionally, to other parts of the UK. Although most of our funding is generated through private philanthropy, we also work in partnership with some regional and national funding bodies to direct resources to vital causes here.

A team of 24, led by our CEO, Rob Williamson, delivers our work. We are governed by a board of 13 trustees who are leaders in the business, philanthropy, charity and public sectors.

Our **strategy** to 2025 has five goals:

1. enable more and better philanthropy;
2. be great at supporting our region's small, local charities and community organisations;
3. understand and act on vital issues affecting our communities;
4. be a shining example of an effective charitable foundation that's accountable to the people it serves; and
5. build and sustain our endowment to £100m and beyond.

Key performance indicators for 2020-25

	Target
Total grants awarded annually	£7.5m
Rolling average gifts added to endowment	£3.0m
Gifts to revenue funds and programmes annually	£2.6m
Total endowment value	£100.0m



How do we work?

We build more and better philanthropy through active donor engagement, rather than transactional donating. We inspire people and show them how rewarding giving is and the difference they can make. We build trusted, lifelong relationships as expert advisors, making connections to local causes donors might otherwise miss, but also raising their awareness of issues and challenging misconceptions about the sector. We meet donors' differing wishes and means through a menu of giving options. While we focus on five-, six- and seven-figure gifts to set up or add to individual, family and corporate funds, we also reach younger and more diverse donors through our Giving Network and collective giving options.

There are two fund models: endowment, where gifts are invested and revenue generated every year to support chosen causes; and annual, where gifts are held as cash and go to support causes in the year ahead. Most funds are 'advised', meaning the donor, their successor or a panel they nominate recommend grants from funding requests sourced and and shortlisted by our team. Other funds are designated to support one or more charities. Some are 'field of interest', meaning grants are made at our Board's discretion while still matching donors' wishes. A few funds are entirely unrestricted.

Professional advisors are key to reaching new donors, as are self-referrals and introductions from existing donors and our ambassadors. We also run activities as a regional hub for community philanthropy to reach people with means to give but who've not yet been motivated to do so. As well as helping donors give in their lifetimes, legacy gifts are front and centre in our plans. We are living through an unprecedented time of intergenerational wealth transfer. The opportunity to help people leave a legacy to their area can't be missed. Legacies also help us build the discretionary money we need to do more strategic work in coming years.

All this means that, unlike traditional charitable trusts, we do not have one pot of money from which we award grants. Instead, we seek to match the 2,500 or more requests for support we receive each year to our 250+ funds. We carry out due diligence and prioritise those that best meet both community needs and the wishes of our donors. Smaller, local organisations are our core constituency, with grantees tending to be those with annual incomes of £50,000 to £500,000. We also award some grants to individuals and broker non-monetary support for the charity sector, including training and trustee-matching.

We run two major research initiatives: Vital Signs, our flagship guide to effective giving based on evidence from statistics, local experts and from our grants; and Third Sector Trends, our independent study of the charity sector's scale and dynamics in the region. We also play a wider leadership role in philanthropy and funding regionally, nationally and internationally. We are active in our national network, UK Community Foundations, have strong links to research on giving and contribute thought leadership through publications, events and advisory groups. Where appropriate, we seek to inform government policy on relevant topics.

We are firmly committed to ensuring philanthropy addresses diversity, equity and inclusion and we are committed to learning and doing more to address racism, sexism, homophobia and other forms of prejudice and discrimination. With Covid-19 having a disproportionate impact on Black and Asian communities, and on people living in poverty, disabled people and those with mental health problems, these priorities are more important than ever.

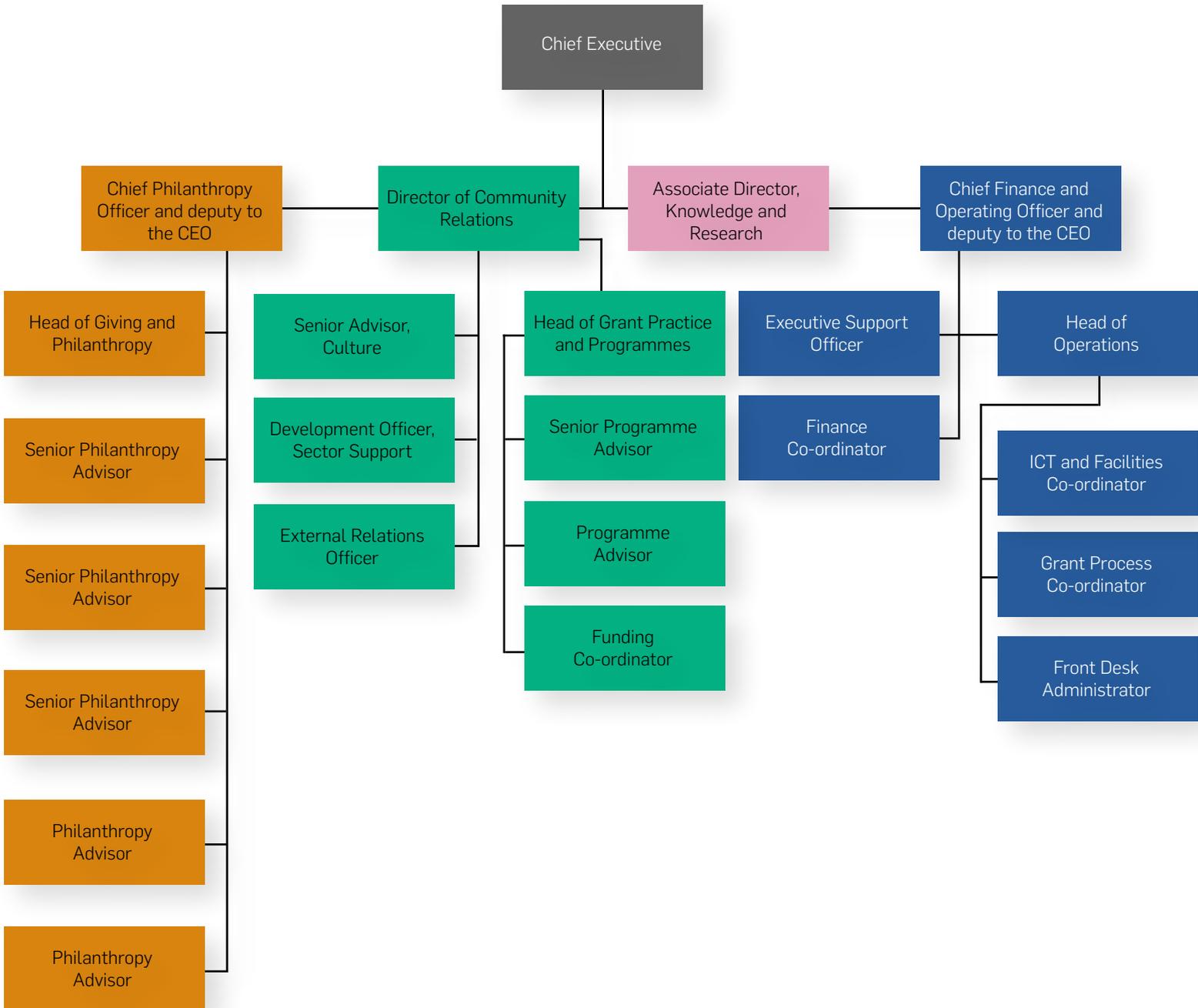
What does the Chief Philanthropy Officer contribute?

As Chief Philanthropy Officer, you'll lead our strategy to grow the scale and effectiveness of private giving, and you'll develop insights and best practice in philanthropy to inspire and engage donors in meeting community needs. You will have overall responsibility for solicitation and stewardship of major gifts, especially to the endowment, in line with donors' wishes. And you'll lead on ensuring an excellent donor experience and high levels of satisfaction – all bolstering our role and reputation in the field.

You will report to Rob Williamson and act as one of his two deputies, alongside Sonia Waugh, Chief Finance and Operating Officer, playing an organisation-wide role on governance, strategy and operations, and championing our values.

You will line manage six staff: the Head of Giving and Philanthropy, who is responsible for new business development, plus three Senior Philanthropy Advisors and two officer-level Philanthropy Advisors, who are responsible for stewarding existing donor relationships and awarding grants from donor funds. They are an experienced and high performing group, so you'll provide support, coaching and challenge, but you won't micro-manage. Like everyone at the Foundation, you'll be highly professional but not take yourself too seriously.

Organisation Chart



Job Description

Job Title: Chief Philanthropy Officer

Direct reports: A Head of Giving and Philanthropy, responsible for cultivating gifts from new donors, three Senior Philanthropy Advisors managing portfolios of grant-making funds and donor relationships, and two Philanthropy Advisors who assess grants, support donor development and manage lighter-touch funds.

Accountable to: Chief Executive

Role purpose: The Chief Philanthropy Officer (CPO) leads the Foundation's strategy to grow the scale and effectiveness of private giving, and they develop insights and best practice in philanthropy to inspire and engage donors in meeting community needs. The CPO has overall responsibility for solicitation and stewardship of major gifts, especially to the endowment, in line with donors' wishes. They also lead on ensuring an excellent donor experience and high levels of satisfaction. As a deputy to the CEO and member of the executive team, the CPO champions the Foundation's values and plays an organisation-wide leadership role on governance, strategy and operations. The CPO directly manages the philanthropy section, providing support, coaching and performance evaluation.

Main Responsibilities Foundation Leadership

- Play a central role as a member of the executive team in the overall leadership, strategy and governance of the Foundation, and in leading on and modelling its values.
- Support organisation-wide effectiveness by taking ownership of agreed areas of corporate policy- and decision-making and by facilitating cross-team communications and support.
- Lead on engaging trustees in growing and cultivating the pipeline of potential donors.
- Lead the development of the Foundation's philanthropy advice, ensuring effective fund distribution, high levels of donor satisfaction and excellent but efficient services.
- Take responsibility for effective and consistent fund management practice across the organisation, including overseeing related professional development and qualifications.
- Act as a deputy to the Chief Executive alongside the Chief Finance and Operating Officer, carrying out related duties as required.

Donor cultivation

- Create, oversee and report on strategies for soliciting and stewarding major new, repeat and legacy gifts, playing an active and hands-on role in cultivating potential donors.
- Lead plans for engaging professional advisors, ensuring they are well informed about the Foundation and are confident and keen to refer clients.
- Ensure the effective use of CRM systems to gather and use information to support development in line with the Foundation's policies and data protection requirements.
- Ensure effective marketing of the Foundation's philanthropy products and services.
- Provide technical expertise to support gift acceptance in line with the Foundation's policies, and to deliver a range of fund distribution options that support donors' wishes and meet community needs.
- Lead efforts to engage more diverse donors to better reflect the Foundation's communities.

Donor stewardship and philanthropy advice

- Ensure an excellent and rewarding donor experience which maximises use of effective technology and efficient systems to support donor engagement.
- Lead and represent the Foundation in the most complex and high-profile donor engagements, including overseeing the effectiveness of its relationships with its Patrons.
- Ensure high levels of distribution from funds through effective relationship management and grant-making in line with donors' wishes.
- Oversee effective transition of fund advisor relationships and family succession.
- Develop and deliver opportunities for donors to learn about vital issues in communities.
- Lead on recognising appropriate milestones and achievements in donors' philanthropy.

Field leadership, insight and innovation

- Advocate for the role of the Foundation and philanthropy in addressing community needs.
- Represent the Foundation externally, developing and promoting its thought leadership in philanthropy, including by publishing articles and speaking at events.
- Engage with the wider philanthropy field including researchers, advisors and other practitioners, ensuring the Foundation understands, influences and shares best practice.
- Ensure the Foundation is abreast of trends in philanthropy, including issues relating to tax-effective giving, to inform donor development and services.
- Create opportunities for innovation in philanthropy, and for developing the Foundation's role in giving initiatives regionally and nationally.

Operations and management

- Manage staff up to Director level, supporting them to work to high standards and contribute to consistent and effective practice across the organisation.
- Appraise staff performance annually against agreed plans, targets and competencies and make salary recommendations in line with the Foundation's remuneration policy.
- Take responsibility for own and others' professional development, seeking and maximising opportunities to acquire new knowledge and skills to benefit the Foundation.
- Undertake other similar duties commensurate with the seniority of the post and the Foundation's position in the philanthropy and funding fields.



What are we looking for?

While you might not currently live in or be from this area, you'll share our passion for North East England and want it to thrive. And you'll be a firm believer in the power of giving and philanthropy to support small, local charities and address community issues.

You don't need to have worked for a charitable trust or foundation previously, but you will have a high-level understanding of private philanthropy and giving, alongside senior experience in a relevant field e.g. philanthropy advice, family/wealth advice, business development etc. And you'll personally have cultivated, stewarded or advised on major gifts or investments from private individuals, families or businesses.

Your credibility, integrity and professional judgement will inspire staff, trustees and donors. You'll instil confidence as a deputy to the CEO and be able to act effectively in their absence. You'll be a strategic relationship developer and manager, with a proven track record in leading teams and projects. You'll bring top-notch organisational, communication and negotiation skills. And you'll thrive when using ICT, CRM and operational systems to maximise the impact of your work. You'll be able and willing to work flexibly, to travel for work within the region, and occasionally outside it, and have access to transport for getting to areas not served by bus/rail.

It will be an advantage, but it's not essential, if you've experience of community foundations or other donor-advised funds; of working with a Board of trustees/directors; of engaging professional advisors; and/or of aspects of grant-making. We do not require a degree, but we are looking for someone committed to their own development through vocational/professional learning and/or higher education, so would be interested in any training or studies you'd successfully undertaken in a relevant field.

Knowledge and Experience

Essential

- Senior-level experience in a relevant field e.g. philanthropy advice, family/wealth advice, business development etc.
- High-level understanding of private philanthropy and vehicles for giving.
- Personal experience of successfully cultivating, stewarding and/or advising major gifts or investments from private individuals, families or businesses.
- Completion of a higher education qualification or an equivalent commitment to vocational learning and/or professional development.
- An awareness of the key socio-economic issues relevant to the Foundation and the role of the voluntary sector.

Desirable

- Experience of working in or with community foundations or other donor-advised funds.
- Experience of working directly with a Board of trustees/directors.
- Experience of working with professional advisors.
- Experience of grant-making.

Skills and Abilities

- Superior written and verbal communication skills, including confidence in public speaking and an ability to persuade and negotiate effectively.
- Demonstrable ability to build relationships across a diverse range of internal and external stakeholders.
- Demonstrable ability to lead the organisation in the absence of the Chief Executive and deputise for them when needed.
- Excellent organisational and time management skills.
- Competent with and enthusiastic about using a wide range of ICT and operational systems, including familiarity with CRM programmes.
- Track record in leading and managing staff and supporting colleagues.

Values and Behaviours

- Strong commitment to, and ability to lead on, the values of the Foundation.
- Highly motivated, enthusiastic and able to cope well under pressure.
- High levels of integrity and excellent professional judgement.
- Able and willing to work flexibly, including regularly attending meetings and events outside normal office hours.
- Able and willing to travel for work within the region, and occasionally outside it, with access to transport for getting to areas not served by bus/rail.

Terms of Appointment

Contract

Permanent

Salary

The salary for this role is £60,000 - £65,000

Work Pattern

Full time, 35-hours, 5 days a week.

What will we offer you?

We are currently benchmarking other terms and benefits, but you will have a workplace pension where we contribute 6% to match your 5%. You'll have 25 days leave a year plus public holidays. We also run a generous flexi-time system and are trialling staff working from home for 20% of their time each month.

Your normal place of work will be a spacious, modern and accessible office in a beautifully converted Victorian chapel in the suburb of Gosforth, just north of Newcastle city centre, where there is a wide range of shops, cafes and leisure outlets and excellent public transport links. Staff facilities include a kitchen, shower, free refreshments, bike storage and on-site parking (by arrangement). You also get business travel and accommodation expenses, and access to the Metro scheme and cycle hire/purchase package through the Green Commute Initiative.

We are holders of the 'continuing excellence' mark in the regional Better Health at Work scheme. Within this, staff have access to free counselling and on-site mental health first aid. There are team development days and training opportunities, and you can take half a day a month paid time off for voluntary work. We're committed to diversity, equity and inclusion, ensuring everyone can make best use of their skills, free from discrimination or harassment.



How to Apply

If you would like discuss the role before making an application please contact Toni Anderson at toni.anderson@starfishsearch.com

To make an application, please go to <https://starfishsearch.com/jobs/comm-found-chief-phil-off/> and click on the apply now button, with the following prepared:

- Your CV (no more than three sides).
- A supporting statement (no more than two sides) that tells us:
 - Why working for Community Foundation TWN really excites you at this point in your career
 - How you meet the knowledge and experience criteria.

We would also be grateful if you would also complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

Search closes:	4th March 2022
Preliminary interviews with Starfish:	w\c 14th March 2022
Interviews with Community Foundation TWN:	End of March or early April 2022

