



CANDIDATE PACK FOR HEAD OF FUNDING



WELCOME

Dear Candidate,

Thank you very much for your interest in becoming the new Head of Funding for The Robertson Trust.

We are an independent funder, half-way through a ten-year commitment to our mission. In our current three-year Plan running to March 2025, we will have committed an average of £25 million per year to charities working in Scotland. We are preparing an ambitious growth plan for the coming years.



We are now seeking an experienced Head of Funding who will lead a team of 12 responsible for our open, responsive grant-making function with an average annual budget of c.£17 million spanning from Wee Grants to Large Grants. Following an independent Funding Preview undertaken for the Trust by IVAR in 2024, we have a clearer view of the challenges facing us now and in the years ahead. We want to make progress as a flexible funder, with increased multi-year, unrestricted grants. We are developing improved Funder Plus support to grantholders, recognising the demand pressures and capacity constraints facing so many of the charities we work with. We want to drive stronger thematic alignment, go further on participatory grant-making and understand what AI means for our work.

You will be an experienced grant maker with a successful track record in shaping a significant grant-making programme. Your in-depth knowledge and experience of how the needs of charities are changing in response to demand pressures, including the pandemic and cost-of-living crisis, will be invaluable to us as we shape our future funding. Our role as a funder is critically important in delivering life changing impact and you will have a leading role in shaping how we respond to the needs of those we fund and the people and places they serve.

The role involves a strong degree of collaboration with other teams at the Trust to ensure effective delivery for those we are here to serve, and a culture of ongoing improvement. It involves developing strong relationships with peers in the Scottish and UK funding sector in order to connect with emerging good practice and share what we are learning from our own work.

We are ambitious in how we go about delivering on our mission. We are open to new ideas, perspectives and challenge. We know that we will only achieve lasting solutions to poverty and trauma by getting closer to those who are experts by experience as well as the partners who seek to serve them.

We recognise we have the greatest chance of success if our staff team draws upon a wide range of experience and knowledge. Increased diversity is a key focus for us. We want to enrich the range of experience and insight we currently have in our team by encouraging applications from people with a variety of ethnic, cultural and social backgrounds and life experiences.

If you share our commitment to build lasting solutions to poverty and trauma in Scotland, and you have the skills, experience and personal qualities to be our new Head of Funding, we would love to hear from you.

A handwritten signature in black ink that reads "Jim McCormick". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Jim McCormick
CEO

ABOUT US

The Robertson Trust's mission is to prevent and reduce poverty and trauma in Scotland, by funding, supporting, and influencing solutions to drive social change.

In Autumn 2020, we launched a 10-year strategy to take action on poverty and trauma – two of the most significant related challenges facing Scotland. To do this well, we must put our resources to work in a way that not only delivers impact in the here-and-now but also works upstream to prevent hardship and harm.

As we approach the mid-point of the decade and our strategy period, we have a responsibility to do more than just alleviate the worst impacts of poverty and trauma. We are committed to using our assets, our independence, our voice and the voices of our grantholders and partners to help shift the dial towards prevention and lasting social change. This is what drives our work and why we have refined our mission statement in 2024.

During this period, we marked the 60th Anniversary since the Trust was established by the three Robertson sisters, pioneering women of business and philanthropy. You can [read our story and watch the film](#) marking this Anniversary.

The Trust is the majority shareholder of The Edrington Group. Our income flows from a dividend on the company's operating profits and a significant set of pooled investments. This has enabled us to commit an average of £25M in charitable expenditure per year by 2025.

We have a Board of 12 Trustees with [Morag McNeill joining as the new Chair](#) in January 2025.

Our latest Impact Report can be viewed [here](#) – we invite you to take a look at some examples of the valuable work we have funded recently including [North Edinburgh Support Services \(NESSie\) consortium](#) and [Serving the Future](#), one of our Partners in Change collaborations between Fraser of Allander Institute and the Poverty Alliance.

In 2024, we undertook a major project in order to align our funding priorities closely with our revised Mission. Following a pause over the summer, which led to a [significant increase in grants made](#), we have returned with improved offers through [Small and Large Grants](#), [Wee Grants and Transport Grants](#). Applications for the revised theme of [Nurturing Relationships](#) are now being assessed.

Our values of Ambition, Integrity, Connection and Equity are the compass points we will use to shape our contribution around four priority themes:

- Financial Security
- Work Pathways
- Education Pathways
- Nurturing Relationships

We are building our know-how on issues of power and justice across our work. We seek to build solutions that meet two cross-cutting objectives on [Climate Change](#) and [EDPR](#) (Equity, Diversity, Participation and Rights), in particular advancing racial justice. We have committed to a whole organisational approach to anti-racism and allyship, becoming trauma-informed and advancing meaningful participation of people with direct experience of the challenges we are here to address.

JOB DESCRIPTION

Job title:	Head of Funding
Reports to:	Chief Executive Officer
Direct reports:	The Funding Team currently has 11 members. You will lead and line manage two Funding Managers who in turn have responsibility for seven Funding Officers, one Funding Support Officer and one Funding Support Assistant. You will also, in the interim, line manage the new Advancing Racial Justice Fund Coordinator – a fixed-term post being recruited in tandem with this role.

ROLE PURPOSE

The Head of Funding role is a Senior Management Team position which addresses a significant vacancy at the Trust following the departure of the previous Head of Giving.

Funding is one of our three current objectives, alongside **Supporting** and **Influencing**. This role involves lead responsibility for open, responsive grant-making (Our Funds) with an average annual budget of c.£17M during 2022-25; and a high level of collaboration with the Head of Insight and Impact, the Learning and Communications team and the Head of Programmes and Practice who takes the lead on other funding including Programme Awards and the Scholarship Programme.

MAIN RESPONSIBILITIES

Working with the CEO and SMT, you will:

Lead the Funding Team

- Lead and manage the Funding Team's approaches to grant-making to drive the Trust's Mission of preventing and reducing poverty and trauma in Scotland.
- Ensure the effective running of day-to-day operations of the Funding Team with line management responsibility for two Funding Managers based in Glasgow through regular one to one meetings and appraisals.
- Be responsible for the overall budget of Our Funds, the open grant-making channel with average annual expenditure of c.£17M in our current Plan period. See our **Impact Report 2023** for further information on the scale and range of grants made. This includes a co decision-making role with the CEO in regular decision meetings on Large Grants (with a value above £20,000 per year) in line with the delegated authority framework agreed with Trustees.
- Be responsible for continuous improvement of Our Funds which currently span Large Grants, Small Grants, Transport Grants and Wee Grants. A further strand on Community Spaces opening in February 2025. The approach to grant management and improvement will be aligned with our flexible funding commitment through **IVAR's Open and Trusting community of practice**.
- Lead regular team meetings with Funding Managers and discussions with the SMT drawing upon timely analysis of management information and other relevant data.
- Ensure that our grant-making policies and procedures are developed fully, communicated clearly and implemented effectively within a review cycle.
- Identify and manage key risks and opportunities related to grant-making.
- Ensure grant terms and conditions are communicated clearly and applied consistently.
- Take day to day responsibility for Safeguarding within Our Funds to ensure robust arrangements are in place.
- Use a range of feedback channels, identifying priority actions from regular applicant feedback, Funding Team insights, and bi-annual Grantholder Surveys, team appraisals and other sources of insight.
- Take the lead on the Trust's **Funder Plus support to grantholders** (and wider support to the voluntary sector), ensuring our offers are responsive to emerging pressures and capacity-building needs, reflecting the changing realities experienced by our grantholders.
- Build on the Trust's work to date, and learning from peers, to develop, implement and apply learning from Participatory Grant-Making to increase the contribution of this approach to delivering our Mission.

- Scan the landscape for risks and opportunities facing funders, including AI, and identify what these mean for our approach to grant-making.
- Ensure that grant-making policies and procedures are applied with fairness, transparency and consistency in line with our **EDPR (Equity, Diversity, Participation and Rights) commitment**.

Drive collaboration aligned to our Mission, Vision and Values

- Lead the Funding Team to ensure our ways of working reflect the Mission, Vision and Values of the Trust, and enhance the Trust's culture.
- Contribute actively with colleagues who lead on the Trust's Impact and Insight Framework to ensure a diverse range of data sources are being drawn upon to drive improvement within a strategic learning cycle.
- Along with SMT colleagues, ensure that we nurture the collaborative working relationships we need to ensure our staff are motivated, engaged and productive.
- Achieve a high level of collaboration with colleagues who take the lead on other types of funding including Programme Awards, our Scholarship programme and the Each and Every Child programme which the Trust hosts.
- Enable collaboration through cross-team working focused on our primary themes, Climate and EDPR commitments and Digital transformation, including but not limited to ongoing development of Salesforce (our grants management system).

Develop strong stakeholder relationships with peers

- Build strong relationships with Scottish and UK Trusts and Foundations, connecting to emerging good practice and contributing what we are learning from our own work to key networks including Scotland Funders Forum, Scottish Grantmakers and the Association of Charitable Foundations (ACF).
- Engage with **IVAR** as a member of the Open and Trusting funder community of practice, ensuring our commitments to flexible funding are applied in practice.
- Engage with the **Foundation Practice Rating** review cycle as a funding partner, in a spirit of transparency.
- Engage with relevant funder and sectoral networks including **CAST** on the risks and opportunities created by the growth of AI.
- Work in the open, sharing our approach and plans as well as regular grant-making data.
- Engage with other stakeholders to ensure the Trust understands the wider factors that helps and hinder the organisations we are here to fund and the people and places they serve.

Provide direction, expertise, guidance and leadership

- Contribute fully as an active member of the SMT in the delivery of our next Plan, through priority-setting, resource planning, development of annual/quarterly action plans and by contributing to day-to-day decisions on strategic and operational matters.
- Build a highly effective working environment underpinned by strong communication.
- Take responsibility for specific projects or programmes of work to deliver the plans agreed for the Funding Team and to support the wider work of The Robertson Trust.

Manage risk and opportunity to provide assurance via governance

- Take the lead in managing risk and opportunity within the Funding Team and contribute to other areas of the Trust's high-level Risk Register along with SMT colleagues.
- Drive ongoing improvements in our funding practices rooted in a culture of learning, drawing on insights from applicants, grantholders, colleagues and peers, Internal Audit recommendations and other relevant sources.
- Work with the CEO and SMT colleagues to provide assurance to the Board of Trustees, including through a quarterly Funding report.

We are searching for someone who can demonstrate Values-based leadership in practice and with a commitment to our Mission, a track-record of working on issues related to Poverty and Trauma and/or an interest, understanding or insight into how our Mission should inform ways of working rooted in our Values.

OUR VALUES

Ambition

We are not afraid to take on difficult issues and will take risks in pursuit of positive change. We underpin our approach with curiosity, agility and commitment to learning and continuous improvement.

Connection

We work collaboratively and are informed by the knowledge and experience of those we work with. We are compassionate in our interactions and value quality relationships based on honesty, understanding and support. Our independence is a valuable asset, but we recognise that working with others makes us all stronger.

Integrity

We take personal and collective responsibility for our actions and how we use our resources. We are trustworthy, consistent and open about our successes and failings. We welcome challenge and feedback in order to improve our work.

Equity

The Trust is committing to a new Value of Equity in line with our EDPR statement. Work to define this will be completed in tandem with the launch of our next Plan in April 2025.



PERSON SPECIFICATION

KNOWLEDGE AND EXPERIENCE

- Excellent leadership and people management skills, experienced in adapting to change and focused on enabling colleagues to achieve agreed objectives.
- A successful track-record in shaping a significant grant-making programme that has delivered effectively on strategic plans and objectives.
- In-depth experience of how the needs of charities, ideally in Scotland or the wider UK, are changing as a result of the pandemic, cost-of-living crisis and other funding and demand pressures.
- In-depth experience of how grant-making is responding in this changing landscape, combined with an openness to learn and adapt.
- Experience of engaging with peer and stakeholder networks, being the face and voice of a grant-making organisation
- Experience of responding to challenges when they arise with clarity and consistency, taking an analytical approach to solving problems.

SKILLS AND ABILITIES

- Being strategic, creative and clear in the approach to priority-setting, decision-making, annual/quarterly planning around agreed milestones, underpinned by analysis of management information and other relevant data.
- Exceptional skills of analysis and communication (both written and verbal), with the ability to listen and respond to staff and Trustees.
- A proven ability to prepare succinct reports with clear analysis and well-developed recommendations for change and improvement.
- Ability to scan the landscape for risks and opportunities facing funders, including AI, and identify what these mean for our approach to grant-making.



TERMS OF APPOINTMENT

SALARY

The salary for this role is £70-80,000, subject to range of skills and experience.

LOCATION

Robertson House in Glasgow city centre with occasional time spent at The Barracks Conference Centre in Stirling.

PENSION

A 10% employer contribution or 14% if employee contribution is 7%.

ANNUAL LEAVE

35 days including public holidays which can be taken on a flexible basis apart from the Christmas and New Year holiday when the Trust closes.

ADDITIONAL BENEFITS

The Trust offers an attractive benefits package, which is currently undergoing review. Further details on request.



HOW TO APPLY

We hope you will consider making an application. If you have questions about the appointment and would find it helpful to have an informal conversation, please contact chris.milo@starfishsearch.com and we will be happy to arrange a call. To make an application, please go to <https://starfishsearch.com/jobs/robertson-trust-hea-fun/> and click on the apply now button, with the following prepared:

- Your CV (no more than two sides).
- A supporting statement (no more than two sides) that sets out why you think this role is the right move for you and how you meet the knowledge and experience criteria. You should address the key responsibilities, experience and skills. Please also tell us about how two of our values are, or have been, particularly relevant in your work or life, outlining how you have demonstrated a commitment to them and how they would influence your approach as Head of Funding.

We would also be grateful if you would 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.

Closing date: Monday 24th March 2025

Preliminary interviews: w/c Monday 7th April 2025

Final Panel interviews: w/c Monday 28th April 2025

