

Candidate Pack:

Business Development Executive
(Community and Commercial Research)

August 2017



Message from the Chief Executive



Thank you for your interest in applying for the role of Business Development Executive with the Community Foundations for Lancashire and Merseyside.

The Community Foundations is an independent charity which promotes local giving to address local disadvantage. We help individuals, families, companies, charitable trusts and public sectors bodies to connect, support and invest in communities across Lancashire and Merseyside.

The organisation started life in 1999 in Merseyside and 2007 in Lancashire as two separate entities, sharing one back office, before officially merging in 2014. We are a member of UK Community Foundations and therefore a network of 48 community foundations in the UK, along with being part of a movement of 2,500 community foundations worldwide.

Since 1999, we have distributed in excess of £50 million to charities and community groups across Lancashire and Merseyside. Our knowledge of the sector allows us to find and reach charities in our community and our ultimate vision is to drive as much investment into Lancashire and Merseyside's Voluntary and Community sectors to enrich the lives of local people.

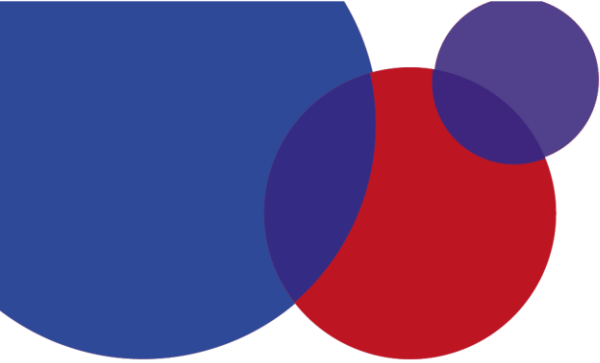
Charitable donations have come from up a variety of key supporters who choose to undertake their charitable giving with us, including major philanthropists, such as former LFC footballer Jamie Carragher and Sir Terry Leahy, national trusts & foundations, such as the Westminster Foundation and W O Street Foundation, and committed corporate citizens, such as Hill Dickinson, Liverpool ONE, and United Utilities.

The Community Foundations now exist in a new era of majority private funding and we are developing a philanthropic client offer and a growing community leadership role. We are now seeking a Business Development Executive to work with us in this new era, particularly leading on our commercial and community research plans. If you have experience of working in a research and data management environment, we would like to hear from you.

Kind Regards

Rae Brooke

Chief Executive



Background Information

Our Community Funding

We distribute around £1.5 million to £2 million in funding to communities each year with a typical average grant level of £3,500. We support vulnerable individuals, households in need, community groups, residents' associations, charities and social enterprises to improve the lives of local people across 12 social themes.

Our Philanthropy Advising Offer

We administer 50 funds and foundations mainly on behalf of wealthy individuals, families, trusts & foundations and companies. We also secure contracts to distribute public sector funds, such as with Lancashire County Council and Merseyside Police & Crime Commissioner.







Our Partners

Our partners are varied and wide, including Liverpool John Moores University, the Liverpool City Region Local Enterprise Partnership and North & West Lancashire Chamber of Commerce. We also work in partnership with a number of legal and financial practices across the region, offering philanthropy advice to their clients.

Our Team

We are a staff team of 12 who cover the function areas of Community Philanthropy, Finance & Operations and Organisational Effectiveness, led by our Chief Executive. Our office is based in Liverpool city centre, courtesy of Liverpool ONE with a satellite office in Preston, courtesy of North & West Lancashire Chamber of Commerce.

Our Board is made up of the following members:

-  Arthur Roberts, Chairman
-  Andy Myers, Vice Chairman
-  Chris Bliss, Trustee for Philanthropy Development
-  Amanda Meachin, Trustee for Philanthropy Development
-  Babs Murphy, Trustee for Philanthropy Development
-  David Wareing, Trustee for Legal

Further information on our work can be found at www.lancsfoundation.org.uk and www.cfmerseyside.org.uk.



BUSINESS DEVELOPMENT EXECUTIVE (COMMUNITY AND COMMERCIAL RESEARCH)

FULL TIME

Job Summary

Under the guidance of the Chief Executive and Community Philanthropy Director, you will support the delivery of agreed elements of our charitable giving and growth plans, working closely with the Business Development Executive for Events & Marketing.

Your priorities will be to support the generation of new income, recruitment of new donors, and the retention and relationship management of existing donors, particularly through the utilisation of effective community and commercial research. You will especially support our work to seek, negotiate and secure income. Our current donors include:

- Charitable Trusts and Foundations (active and dormant)
- Corporate/Private Sector
- Individuals and Families
- Professional Advisors
- UK/National Philanthropic Programmes

You will also be required to support colleagues in the Community Philanthropy team to undertake administration as work-loads fluctuate, working with the Community Philanthropy Senior Executive.

Responsible to:

You will be directly responsible to the Chief Executive, working within the Community Philanthropy function.

Responsible for:

You will work closely with all colleagues at an Executive level to oversee our administration, to ensure effectively and efficient practices.

You will also be required to work closely with the Chief Executive and Operations Team as well as overall with staff, trustees and supporters across the organisation

Salary

The salary range for this position is £18,000 - £20,000 per annum. However, there is potential to progress at a future date, if you take on additional responsibilities that would help meet the needs of the Community Foundations, if required by the board and/or Chief Executive at that time and provided you meet the level of competency that would be required.



Values and Behaviours

Like every employee, you will be expected to exhibit the following corporate values and behaviours: Community Leadership, Pride, Transparency and Working Together.

Job Description

Your primary tasks are to undertake:

Research

- Research to identify and secure potential new supporters for the Community Foundations;
- Research via credible data sources to inform our Vital Signs giving guide, our community investment and social impact reporting;
- Research for the Community Foundations or stakeholders to further our work, including to support donor retention and relationship management;
- Research to support organisational and market development, helping to keep any eye on the marketplace and our competitors.

Community Knowledge

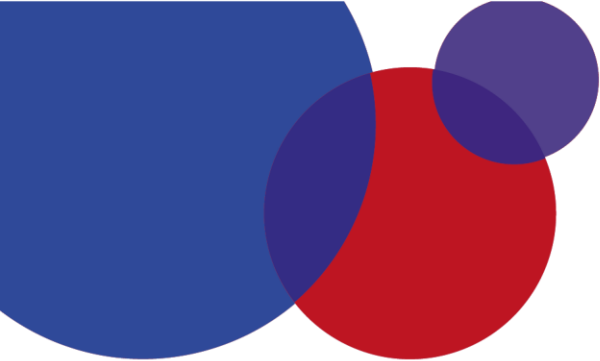
- Planning and delivery of our annual Vital Signs giving guides to help fulfil our annual targets and objectives as well as our Business Plan, especially in the areas of New Business and donor care and philanthropy education;
- Community consultations in an appropriate and professional manner to guide the Community Foundations' work, sharing findings internally and externally;
- Measurement of the impact of our activities, especially our community investment and related social impact, to inform our future work and raise our profile.

Administration

- General administrative duties, such as data inputting, reporting or assessments, working with and co-ordinated by the Community Philanthropy Senior Executive

In particular, you will also:

- Support major income generation activities, ensuring transparency, due diligence and strategic aims achieved on behalf the Community Foundations, taking into account local research, community consultations/aspirations, expert advice and donor interests;
- Support colleagues with proactive work with the Board of Trustees to achieve targets, especially for endowment building and New Business;
- Support the delivery of our marketing activities, including brand and reputation management, media relations, social media, New Business materials, donor reporting, special projects and website content management,
- Support the building and maintenance of relationships with stakeholders, such as donors and professional advisors, to enable donor introductions, client referrals, corporate giving and legacy donations;

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- Support the delivery of our events for stakeholder relationship management and/or donor cultivation;
 - Attend relevant external forums for networking to raise the profile of the Community Foundations and source new funding prospects;
 - Ensure effective database management, maximising the use of technology for time and cost effectiveness;
 - Support colleagues to ensure high retention rates and demonstrable growth with existing and new donors, ensuring full cost recovery;
 - Measure the impact of our activities to inform future internal and external activities;
 - Provide administrative support, prepare briefing and presentation materials and attend events or meetings with and for the Community Philanthropy Director and Chief Executive;

You will also be expected to:

- Attend training courses and events as required and share learning with other staff and the trustees, as relevant;
- Occasionally work weekend and evening hours, for which time in lieu will be given;
- Contribute towards other aspects of the Community Foundations' work as required, commensurate with the scale and general nature of the post;

Person Specification & Competencies

This role requires the following attributes, abilities, skills, knowledge:

Personal Attributes

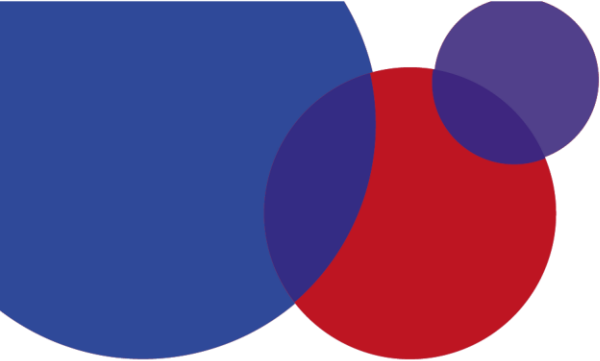
You will have the following attributes to some degree, demonstrating many at least at a basic level, a number at a good level and excelling in a few of the areas:

- professional with good organisational and multi-tasking skills, working well to deadlines.
- innovative and creative with the ability to bring ideas to life.
- proactive and productive, a self-starter who takes pride in own work and uses their initiative.
- ability to be adaptable, seeking opportunities, whilst mitigating risks.
- good communicator.
- welcomes opportunities to learn, and works towards creating a learning organisation.
- ensure high standards in quality of work and customer service.

Collaboration & Team Working Abilities

You will have the following abilities to some degree, demonstrating the majority at least at a basic level, a number at a good level and excelling in one area:

- demonstrate the capacity to build and maintain a wide range of relationships with stakeholders, project teams and colleagues;

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- ability to work in a small office environment and be self-motivated, solving problems within tight resource constraints
 - develop plans and drive forward delivery of own objectives and contribute positively to achieving team and organisational objectives;

Specific Knowledge, Experience & Skills

You will have knowledge and skills, to at least a basic level, in the majority of the following areas, especially the essential ones outlined below with a demonstrable knowledge, experience and/or skills in a number of the areas and a specialist in one or two of the areas.

Essential Knowledge, Experience & Skills

- Effective written, verbal, report-writing and presentational communication skills, including the ability to tailor to different audiences.
- Effective use of research tools and sources.
- Highly proficient in information management.
- Ability to assimilate and distil complex information, including written or verbal analysis.
- Capable of engaging confidently in meetings and conferences with stakeholders.
- Consultation work in a public, private and/or social sector setting, e.g. with communities.
- Broad administrative skills.
- Confident and experienced in the use of IT, including Microsoft Office.

Desirable Knowledge, Experience & Skills

- Project management

Special Circumstances

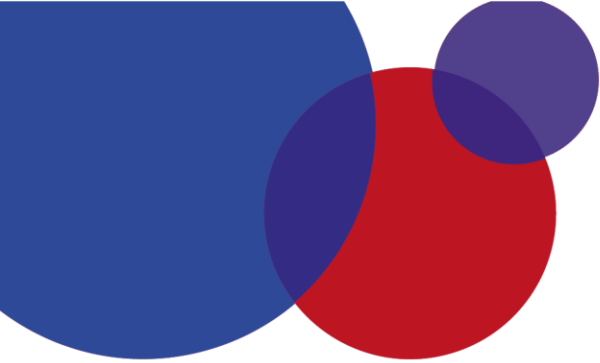
- Able to work outside normal working hours and travel on a planned basis

Key Performance Indicators

Your performance will be measured against financial and non-financial key performance indicators (KPIs), agreed with your line manager in line with the Business Plan and annual targets. These indicators will be broken down into day-to-day and annual working targets agreed between you and your line manager. Your success in meeting them will be assessed as part of your annual appraisal and this will inform any decisions regarding your personal development, training plans, responsibilities and possible progression up the salary band.

Flexible Working

The Community Foundations will consider flexible working requests on an annual basis if suitable for the Community Foundations business aims and operational activities as per the organisation's policy. This includes considering job sharing, compressed hours and working pattern agreements. On application or at annual appraisals, please state if you wish to make a request for flexible working.



How to Apply

To apply for the role please submit a CV and covering letter of no more than two pages on how you meet the role's requirements, especially in terms of the Knowledge, Skills & Experience, to the Community Foundations by 10am on Thursday 31st August 2017. Please send your application to Adam Shaw at adam.shaw@cflm.email.