



## **Head of Fundraising Job Description**

### **The Role**

The Head of Fundraising leads fundraising and develops additional income streams to increase the sustainability of the Society. They help deliver the Transformation Plan, a project to enhance Scotland's oldest learned antiquarian Society to help deliver the Society's vision: "Scotland's past is for everyone to research, share, enjoy and protect, home and abroad".

The Transformation Plan includes the acquisition and redevelopment of a B-listed building in central Edinburgh to co-create the most inclusive, low-carbon and heritage-rich space to work, visit and participate. The plan is to become a heritage hub for Scotland's past, helping to bring heritage alive for a wide range of public audiences. This post provides the necessary vision, leadership, and fundraising skills which will enable the Society to achieve its fundraising targets and enhance its development program.

They are an effective fundraiser and key contact for grant giving organisations, personal donations and legacies. They report directly to the Director sharing collective responsibility to deliver the Society's strategy and vision.

The post is part of the senior management team and liaises directly with staff, Councillors (trustees), Fellows and other organisations and individuals to ensure the successful delivery of their responsibilities.

### **Main Responsibilities**

#### *Strategy and planning*

- Development and delivery of a fundraising campaign (including grant funding, individual and organisational donations, and other fundraising activities) for a c£6m project, setting targets in collaboration with the Director and meeting them, creating engaging and successful proposals and cases for support
- Lead the annual fundraising planning process to produce effective strategies to achieve income targets across a range of revenue streams
- In cooperation with the Director, lead the development of a long-term fundraising strategy to achieve agreed long term Society goals and vision
- Identify new potential income streams and produce strategies to access these funds

#### *Fundraising*

- Manage an effective fundraising team (across the Society staff and volunteers as required) that delivers fundraising income meeting set targets
- Oversee the management of a grant and trust income programme, supporting staff as necessary and ensuring production of effective, high-quality proposals and reports

- Oversee the management of an individual giving programme, supporting staff as necessary and ensuring production of effective, high-quality donor development and reports
- Lead on development of new funding streams
- Develop and maintain effective supporter journeys for the development of relationships and retention

#### *Financial Planning and Budget Management*

- Produce cost-effective budgets to achieve action plans
- Develop and maintain income and expenditure tracking and evaluation systems
- Ensure the Fundraising and Development operation is kept within budget

#### *Senior Management*

The Head of Fundraising and Development is a member of the Society's Senior Management Team (SMT) and as such the post-holder will be expected to play a proactive role in the management of the Society including:

- Organisational strategic planning and development
- Income and expenditure budget planning and management
- Advising members of SMT on the availability of funds and the viability of obtaining funds to support initiatives
- Contribute to leadership decisions on all aspects of policy, development and organisation
- Playing a significant role in the preparation, implementation and monitoring of Society strategy and action plans
- To participate as an active member of the SMT, attending meetings and producing reports as required
- Attending Finance, Audit and Risk Committee meetings to report and give advice on fundraising matters
- Attending and participating in Council (trustee meetings) and producing reports as required
- Contribute to establishing and delivering on the core values of the Society
- Attend and participate in relevant events

#### *Resource Management and Marketing*

- Working closely with the Director and Heads of Research and Outreach to develop costings for all new services
- To contribute to the preparation of the annual budget and make submissions for new funded projects and programmes of activity
- Manage programmes in accordance with budget and agreed proposals ensuring the efficient use of financial resources, spending these against priorities agreed by Council and SMT
- In conjunction with rest of SMT promote all programmes, develop promotional materials and present opportunities for fundraising to cover costs

#### *Staff Management*

Line management of staff, including:

- Agreeing objectives and work plans
- Managing workload and performance through regular one-to-one line management discussions
- Plan and implement personal development program for team members in all relevant skills
- Undertake annual performance reviews

### *The Wider Community*

- In all external relationships to be an ambassador for the Society representing its interests at all times
- Build and foster professional collaborative working relationships and communication with the organisations linked with the Society through collaboration, funding and participation and other relevant professional organisations and government and non-government agencies

### *Other Duties and Responsibilities*

- To develop and participate in staff training as required
- To attend staff and Committee meetings as required
- To undertake any other duties consistent with this role as reasonably directed by the Director

## **Person Specification**

The Head of Fundraising has substantial fundraising and management experience, a talent for building relationships and a proven track record in securing funds from statutory sources, foundations, trusts and major donors. They are a key contact for grant giving organisations, personal donations and legacies. They report directly to the Director sharing collective responsibility to deliver the Society's strategy and vision. As such they have the following:

### ***Person Specification***

#### *Requirements - essential*

- At least three years' experience in a similar role
- Demonstrable record of major capital fundraising leadership and delivery, ideally within a charitable organisation but others will be considered
- A track record of successful fundraising, including sizeable NLHF applications
- Experience of utilising the strength of an organisational brand for charity/business development
- Proven track record of meeting challenging income targets
- Proven ability to build, manage and develop key stakeholder, client and donor relationships including developing and managing individual donors and development of legacy giving
- Experience of developing and implementing strategic and business plans
- Strong leadership skills
- Track record of bringing innovative creative thinking and fresh ideas to an organisation and/or its services
- Knowledge of the fundraising environment including regulations around due diligence and compliance

- Knowledge of a range techniques and disciplines which will support the cost-effective generation of income for the Society
- Excellent interpersonal and networking skills
- Exceptionally convincing and persuasive written and oral skills with the ability to present and convey complex ideas and issues clearly and coherently to a diverse range of audiences
- Ability to secure Senior Management and Board approval for strategy
- Demonstrable ability to evaluate the type of initiatives and programs within the scope of the post and initiate, develop and deliver new initiatives that build on their successes

### *Aptitude*

- Inclusive management style with experience of line management
- Ability to work flexibly, including occasional weekend and out-of-hours work
- Strong commitment to the values and ethos of the organisation
- The ability to drive and embed lasting change
- Highly self-motivated and able to work autonomously, take initiative, make decisions and achieve ambitious targets
- Demonstrable commitment to inclusive working, ensuring equality and valuing diversity

### *Requirements - desirable*

- Experience of working in a charitable organisation
- Experience of working in a membership organisation
- Experience and understanding of working with heritage organisations
- Understanding of the main issues facing the heritage sector
- Entrepreneurial outlook
- Experience of matrix management
- Evidence of Continued Professional Development relevant to the role purpose and level

### **Main Tasks (to be developed – see below)**

- Develop and submit (in collaboration with staff and Councillors) a major NLHF grant application for the Transformation Project
- Liaise with staff, Councillors and external organisations and individuals as required to ensure highest chance of success
- Manage the development of Fundraising and Development strategies as required (including aims and targets)
  - Increase income to the Society (and develop the strategy to do so in collaboration with staff and Councillors)
  - Increase donations and legacies from Fellows and other individuals (and develop the strategy to do so in collaboration with staff and Councillors)
- Support staff to secure funding from and report back to grant giving bodies and companies
- Promote and raise the profile of the Society and its work
- Oversee the publication of the Annual Impact Report
- Contribute (with other members of the Senior Management Team) to the charity's Annual Report and Accounts as required

- Contribute (with other members of the Senior Management Team) to the Transformation Plan strategy and operations
- Attend Society Council (trustee meetings) to report and give advice on fundraising matters
- Attend Society Committees as required, especially the Finance, Audit and Risk Committee, to report and give advice on fundraising matters
- Manage at least one other member of staff
- Other reasonable tasks as required and mutually agreed with the Director

### **Further Information**

This post is an initial 2.5-year (30 month) full-time contract which will be extendible subject to funding. There is a short probationary period during which time your skills and suitability for the position will be assessed. Development of fundraising for the Transformation Plan will be the immediate priority. A lot of work has already been undertaken by the Society in preparing an NLHF application as part of this, but the skill and experience of this post will ensure it has the maximum chance of success. This will include liaising with others, including NLHF staff and our consultants, the More Partnership.

The tasks and role will develop in line with the requirements in that application and the implementation of the Transformation Plan and will be reviewed after the submission of the initial NLHF bid. However, the core responsibility remains the development and delivery of successful fundraising strategies, increasing income to the Society.

Currently there is only one line-management responsibility envisaged – that of the Finance Manager – with the other potential posts (Transformation Manager and Fundraising Officer) to be funded through the NLHF bid and employed later. Other line-management responsibilities will be discussed with the Director from time-to-time as required.

