

# JOB DESCRIPTION

## 1. JOB IDENTIFICATION

<b>JOB TITLE</b>	Head of Fundraising
<b>RESPONSIBLE TO</b>	Foundation Director
<b>DEPARTMENT</b>	Edinburgh & Lothians Health Foundation
<b>DIRECTORATE</b>	Finance
<b>OPERATING DIVISION</b>	
<b>JOB REFERENCE</b>	L-FIN-ELHF-HOFUND
<b>NO. OF JOB HOLDERS</b>	One
<b>LAST UPDATE</b>	11 July 2018

## 2. JOB PURPOSE

To provide strategic leadership and vision to fundraising for the Foundation and NHS Lothian, with the objective of achieving a step-change in the fundraising culture, achieving significant increase in income.

To be responsible for the effective development and delivery of a bold fundraising and development strategy, building the fundraising capacity to achieving stretch targets in all aspects of income generation.

To develop and direct an appropriately skilled staff resource, and provide support and effective management of the fundraising team to deliver performance benchmarks and income targets.

To create a supportive and philanthropic culture where none currently exists across a complex and large organisation, significantly increasing the Foundation's profile and creating an environment in which charitable support of the Foundation toward NHS Lothian becomes normalized.

## 3. DIMENSIONS

The dimensions listed below are based on the Edinburgh and Lothians Health Foundation 2017/18 Annual Report and Financial Statements:

### Statement of Financial Activities

Total funds	£76.757m
Total income	£15.542m
Total expenditure	£14.533m

NB The Edinburgh Cancer Centre is the primary fundraising focus for 2018-2023, however other and future campaigns and appeals including donor-led projects, localized appeals and bespoke programmes (such as arts) will fall within the scope of this post.

### Staffing Responsibilities :

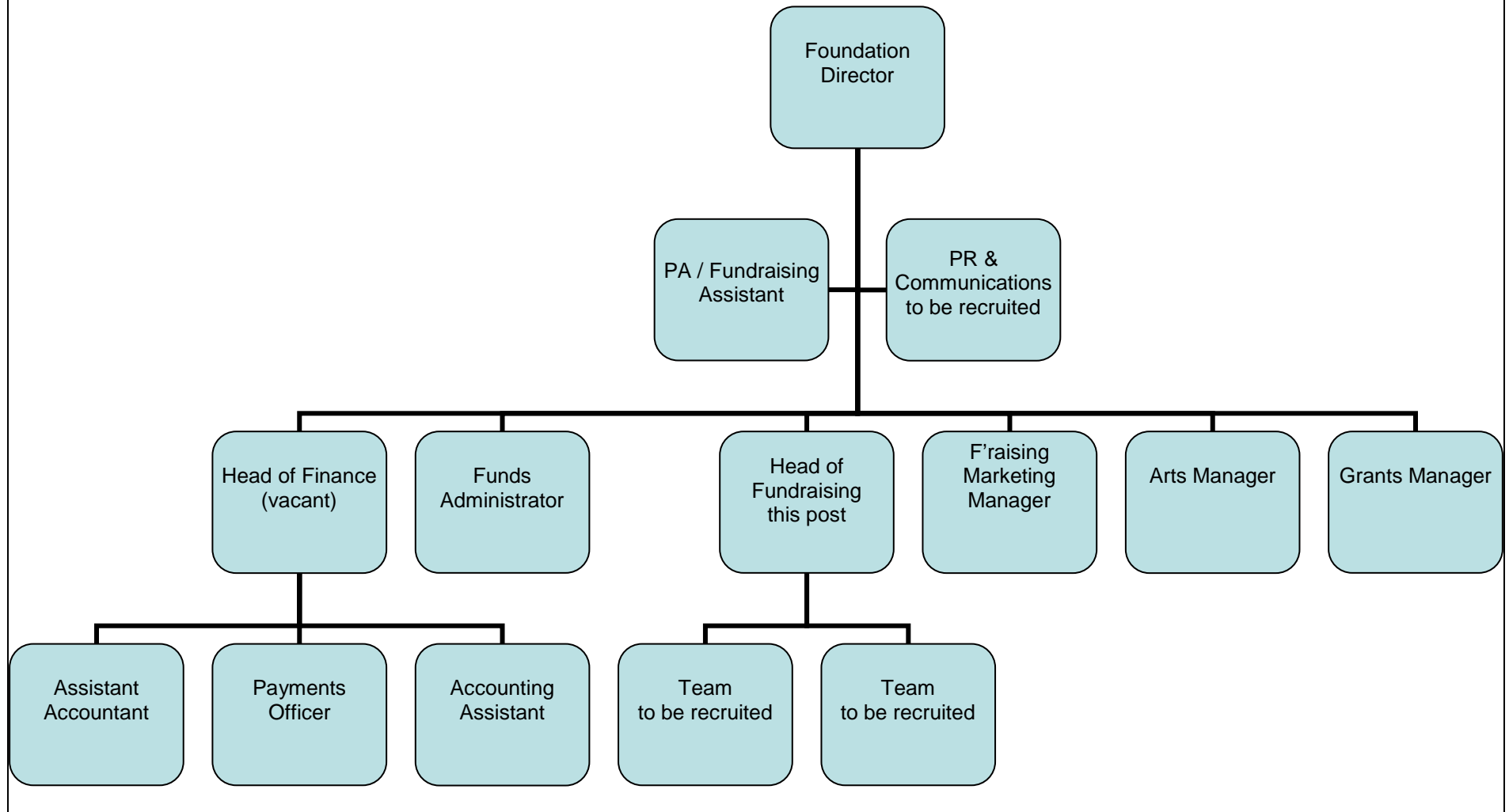
To build and line-manage a team of specialist fundraisers, as a response to the development of a bold but achievable fundraising strategy.

### Financial Responsibilities:

Responsible for articulating and then delivering a stretch income target.

To deputise for the the Director as and when required in all matters relating to the Foundation to Trustees, to the NHS Board and staff, and to the public.

#### 4. ORGANISATIONAL POSITION



## 5. ROLE OF DEPARTMENT

Edinburgh and Lothian Health Foundation is a registered charity which is regulated by the Office of Scottish Charity Regulators (OSCR). The Foundation Office provides a comprehensive endowment management and administration service to NHS Lothian. Specifically:

Guide and support the Foundation trustees to meet regulatory requirements of OSCR.

Provide to the Trustees the financial information required for effective and appropriate decision-making, procuring expert advice and guidance where necessary.

Provide to the Foundation Director a comprehensive endowment management and administration service.

Provide to the Fund Stewards a quality endowment management, guidance and administration service.

Provide a quality grant pathway from initial enquiry to file closure.

On behalf of NHS Lothian Board manage the Arts in Health and Wellbeing Strategy

Raise funds through a quality, customer-focused total development fundraising plan.

## 6. KEY RESULT AREAS

### Strategic Planning and Fundraising Management

1. As a key member of the Foundation Senior Management Team (SMT), support the Director and Trustees in the development and delivery of the Foundation's strategic plan, key business objectives, policies, projects and budgets.
2. Work with the Director to develop and as organizational lead, finalize and review annually the Foundation's Fundraising Strategic Plan and financial projections, including developing a balanced approach to income streams and acceptable risk profile and ROI; implementing, managing and reporting progress against detailed project budgets and KPIs; and managing the budget at team level, setting individual targets and objectives.
3. Lead the Major Giving campaign, nurturing relationships with existing supporters, developing new prospects and personally soliciting and securing significant donations, in particular towards capital campaigns.
4. Fundraising income streams may include: capital campaigns, HNWIs and major gifts, legacy marketing, business / corporates & CotY, grantmaking trusts and foundations, events, sporting events and challenges, school fundraising, community-based activities/volunteers, grateful patient giving, In Memory/Honour, Direct Mail, online giving, NHS staff fundraising and GAYE, lotteries and raffles, merchandise and retail.
5. As organisational lead, ensure effective and responsible fundraising through, interpretation and adherence to industry standard best practice, and direct the Fundraising Department in: high-quality donor care and stewardship, the maintenance of proper records including donor data, Gift Aid and correspondence, GDPR compliance, supporting volunteer fundraisers, appropriate event insurance, complaint handling.
6. Develop and maintain strong relationships with fundraising-active specific funds, charity partners and external charities across NHS Lothian, ensuring there is an accepted mechanism for prioritizing fundraising and no areas of avoidable conflict.

## **Marketing and Communications**

7. Be responsible for the development and delivery of an effective and comprehensive Fundraising Marketing Strategy to support fundraising appeals, and ensure the PR and Communications Manager and fundraising team are equipped to devise and develop high quality professional marketing literature and publicity materials across all channels.
8. Working closely with the Foundation Director, PR and Communications Manager and NHS Lothian Communications Director, be responsible for the development and delivery of an effective Communications Plan, including internal messaging and enhanced profile, ELHF website and online presence (including NHS Lothian website / intranet), and social media.
9. As one of the Foundation's lead spokespeople and ambassadors, secure a high profile for the Foundation, ensuring there is a high level of confidence across NHS Lothian in the fundraising function, engaging with community leaders and other individuals of means and influence, and externally acting as a public face for the Foundation through media relations work
10. Support the Director in upholding and developing the Foundation's brand identity and house style, including subsidiary appeal and campaign logos.

## **Leadership and Management**

11. Line management responsibility for the staff team including recruitment, discipline, appraisal, training and personal development planning.
12. Lead, manage and motivate staff within the team to achieve individual objectives within agreed timeframe, and ensure that staff possesses the necessary skills to achieve those objectives.
13. Represent the Foundation on regional and national bodies, including deputising for the Director as and when required.

### **7a. EQUIPMENT AND MACHINERY**

Essential user of Personal Computer and networked systems within NHS Lothian. Use of office equipment: PC, photocopier, printer/scanner, telephone.

New equipment may be introduced as the organisation and technology develops, however training will be provided.

### **7b. SYSTEMS**

Frequent day-to-day user of MS Office suite of software including Excel, Word, Outlook, Access, PowerPoint and Project. Use of the internet and social media for research and marketing purposes.

Use of Customer Relationship Management (CRM) systems such as Harlequin.

New systems may be introduced as the organisation and technology develops, however training will be provided.

## **8. ASSIGNMENT AND REVIEW OF WORK**

Objectives will be agreed annually with the Foundation Director. The post holder is responsible for ensuring delivery of those objectives within the obligations of the post. Formal review will take place at mid-year and year-end. Update of objectives and review of progress will also take place through regular 1:1 meetings with the Director.

The work of this post is largely self-directed. Workload management is the responsibility of the post holder. The post holder is required to prioritise workload across the team to ensure all the demands of the organisation are understood and all necessary deadlines are met.

The nature of the workload will be a combination of routine, planned and timetabled tasks. In addition ad hoc assignments may be requested. Beyond this the post holder's work will be informed by issues and developments arising out of Trustee meetings and the resulting identification of need as well as evolving best practice or sector developments.

## **9. DECISIONS AND JUDGEMENTS**

Decisions will require to be made where no policies and procedures or previous benchmarks exist. Similarly, trustees will look to the postholder to provide expert advice and recommendations for their own decision-making on a similar basis. E.g. advising on whether a proposal is core / additional and can expect success from a fundraising campaign, managing NHS Lothian expectations in cases of project creep where donors have been fundamental, or at a more basic level making expert recommendations for new forms of fundraising.

Expected to manage objectives and workload autonomously.

Required on own initiative to develop and produce targets and KPIs for a range of fundraising activities and direct line reports, and produce reports for a range of stakeholders, including Trustees and committees, Specific Fund stewards, donors and volunteer fundraisers.

Required to work autonomously, guided by policy and regulations and taking into account agreed departmental and organizational priorities, interpreting how these apply to your own work

Required to deputise for the Director and represent the Foundation as the need arises and to exercise judgment and advise colleagues as appropriate. E.g. representing the Foundation as part of the Cancer Capital Programme Board (with a specific fundraising component), or occasionally at trustee meetings (with a general remit).

## **10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB**

Knowing and understanding the business of the Foundation and its complex interrelationship with NHS Lothian and other connected charities, and the broader voluntary sector and competitive fundraising landscape.

Planning, articulating and recruiting to a specialist fundraising team under unique employment governance requirements, to deliver the resource necessary for a brand new fundraising strategy.

Leading, developing and implementing a fundraising culture where none currently exists across a very large and diverse organisation.

The postholder is ultimately personally responsible for achieving challenging stretch targets for fundraising, through their planned strategy and appointed team.

## **11. COMMUNICATIONS AND RELATIONSHIPS**

The postholder will be required to maintain key relationships and effective communication with a range of other individuals and parties.

Communication will need to be appropriate and flexible to meet the requirements of the recipient(s), including written reports, presentations, informal briefings, group discussions and 1:1 meetings.

The information being communicated may often be complex: patient experience improvement programmes, capital projects, clinical research, with associated budgets, to be conveyed in a clear and concise manner for non medical donor audiences. It may be communicated to inform or influence key decisions, or for formal governance purposes.

Examples of key relationships include:

### **Internal:**

ELHF Chairman, Trustees and Committee Members

NHS Lothian Executive Directors

NHS Lothian Director of Communications

Senior Management such as Director of Capital Planning & Projects, Associate Medical and Nursing Directors,

Senior Clinicians and Clinical Service Managers

Specific Fund Stewards

### **External:**

External fundraisers

Donors

Volunteers

Office of the Scottish Charity Regulator

Other NHS Board / Endowments (Scotland)

Other NHS Charities (England and Wales)

Third Sector organisations

## **12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB**

### **Physical Skills and Demands**

On a regular basis sit at a desk using a PC/laptop for long periods of time inputting data and preparing written reports

Frequent travel to meetings and events in the Edinburgh and Lothians region, and occasionally further afield

### **Mental Skills and Effort**

Requirement for quick thinking, supporting and managing donor expectations, and solving problems quickly and successfully.

Prolonged concentration is required when devising strategy or developing new fundraising activities, and preparing and writing donor and project reports.

Multi-tasking is required, with frequent interruptions from telephone, colleagues and email

Often need to reprioritise work, and prepare information at short notice

**Emotional Demands**

High degree of personal resilience, especially in relation to developing trusted relationships with donors and fundraisers, interpreting and communicating persuasive arguments for funding need, and managing expectations of donors and project managers.

Confidence when representing the Foundation at a senior level, through one to one engagement and public speaking, which demands the ability to influence and persuade potential supporters

**Environmental Demands**

Required to maintain discretion and consider others whilst working within an open plan office environment.

Frequently spends long periods of time using a PC.

**13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB****Qualifications**

Educated to degree standard or equivalent professional experience

MBA or other relevant professional qualification or equivalent levels of experience

Externally accredited qualification such as MInstF (Dip) or (Cert) or equivalent

**Experience**

Substantial senior management experience in leading fundraising, with a track record in significantly increasing income

Significant experience in major campaign development and management, and experience in the delivery of a diverse range of income generation / modern fundraising and consumer marketing activities

Demonstrable success in the setting and management of budgets and achieving fundraising targets

Experience in recruiting major donors and soliciting gifts of six figures and above

Significant experience in fundraising marketing and PR, developing and promoting charity brands, media handling and communications

Experience of recruiting and managing staff teams, and working with volunteer fundraisers

**Skills**

Strong leadership and management skills

Excellent interpersonal skills

Excellent communication and presentation skills

Excellent report writing skills (specifically Case Statements, Case for Support)

Strong organizational skills to ensure competing priorities are achieved to agreed timescales

Good IT skills

#### 14. JOB DESCRIPTION AGREEMENT

A separate job description will need to be signed off by each jobholder to whom the job description applies.

Job Holder's Signature:

Date:

Head of Department Signature:

Date: