



Foundation Director
Job Description & Person Specification

PO Box 695, 13 Upper York Street, Wakefield, West Yorkshire WF1 9NW
www.wakefieldcf.org.uk

JOB DESCRIPTION

- 1. JOB TITLE** – FOUNDATION DIRECTOR
- 2. HOURS** – 37.5 per week (FT)
- 3. LOCATION** – at the Foundation’s offices in central Wakefield, but with the facility to work from home on an agreed basis.
- 4. CONTRACT PERIOD** – permanent
- 5. SALARY** – c. £35k
- 6. BACKGROUND TO THE POST:**

Community Foundations started as a concept in the US in the early part of the 20th century. By the end of the century these Foundations had collective assets of \$30 billion and had made grants totaling nearly \$2 billion.

The UK movement started in the early 1980s and has grown substantially through support from central Government and from the Charities Aid Foundation (CAF). There are now 46 UK Foundations.

The concept of establishing a Community Foundation for Wakefield was first mooted as early as 2000.

A steering group was established in 2006 and the Foundation became operational in the summer of 2007; it is a registered Charity.

The Board of the Charity is well established and the Chair is David Dinmore, until recently a Deputy Lord Lieutenant for West Yorkshire.

The Foundation is now seeking to replace Murray Edwards, its retiring Director, who has occupied the role for the last 5 years, prior to which he was one of the founding trustees.

The successful candidate will take responsibility for furthering the Board’s vision and operational strategy. Although a great deal has been achieved over the past thirteen years, the Foundation is still highly entrepreneurial and continually seeking to develop its work, particularly as the country moves out of lockdown and into the next stage of rebuilding its economy. Presence amongst businesses has been established but there is more to do in terms of raising the profile, bringing in major donors and especially, building the endowment fund.

7. MAIN PURPOSE OF THE POST:

- To give direction to the formulation of and leadership to the achievement of the Foundation's philosophy, objectives and strategies and to its annual targets.
- To oversee the development and management of a permanent endowment fund able to provide grant-giving in perpetuity.
- To establish, lead and manage an effective, efficient and relevant grant making process and programme within the Wakefield Metropolitan District and to facilitate the distribution of flow through funding on behalf of businesses, statutory funders and other donors.
- To be responsible for the management and administration of the Foundation in the execution of the Board of Trustees' policies.
- Together with the Chair, to enable the Board of Trustees to fulfil its functions and to ensure that the Board receives appropriate advice and information on all relevant matters.
- To manage all personnel appointed as part of the development of the Foundation and build relationships with providers of services to the Foundation.

8. PRINCIPAL ACCOUNTABILITIES:

(i) Serving the Board of Trustees and in consultation with the Chair:

- (a) to recommend for the Board of Trustees' approval an annual calendar of meetings for the Board and its sub-committees, together with other important meetings and events.
- (b) to ensure that items requiring the consideration of the Board are placed on the agenda of their meetings as appropriate.
- (c) to report periodically to the Board or the relevant sub-committee/s as appropriate on the progress of the Foundation and on all other matters relevant to the discharge of the Board's responsibilities.
- (d) to help the chair get the best thinking and involvement of each member of the Board and to arrange for briefing sessions etc. to take place as appropriate.
- (e) where appropriate to monitor and make recommendations on the composition of the Board of Trustees and its Committees and to ensure the

Board composition reflects the communities that the Foundation seeks to serve.

- (f) to formulate policy proposals for submission to and approval by the Board of Trustees to ensure that the Foundation discharges its constitutional and legal obligations.
- (g) to report periodically to the Board of Trustees on the progress of the Foundation's work, together with any other matters which are relevant to the discharge of the Board of Trustees' responsibilities.

(ii) Leading and managing the Foundation:

- (a) to co-ordinate the funding strategy for the Foundation to enable it to successfully develop a large sustainable endowment fund. In particular to run specific appeals and to develop income streams from:
 - i. corporate givers
 - ii. high net worth individuals
 - iii. trusts and foundations
 - iv. statutory sources
 - v. professional advisors
 - vi. legacies
- (b) to ensure that the Foundation has a long-term strategy to enable it to achieve its objectives; to monitor and review this strategy on a regular basis; to establish effective review and evaluation methods for all key aspects of the Foundation's work.
- (c) to establish and manage an effective grant-making process, drawing on best practice amongst other Foundations and grant making bodies.
- (d) to make certain that the Foundation's corporate philosophy and policies are consistent, pertinent and practiced throughout the Foundation.
- (e) to lead, direct, co-ordinate and keep under review the work of staff reporting directly to the Foundation Director.
- (f) to ensure that the Foundation has the resources (human, material and financial) to make steady progress towards the achievement of its objectives.
- (g) to establish and maintain an effective system for the recruitment, management, training and development of staff (and volunteers) to achieve the Foundation's objectives and implement its strategy; to develop and implement an Equal Opportunities Policy.
- (h) to act as the chief spokesperson for the Foundation in particular:
 - i. ensure that there is a clear policy on relations with the media, and that the Foundation is presented in a professional manner to its various audiences
 - ii. develop effective networks with key players across all sectors that might positively influence the work of the Foundation
 - iii. create community and donor awareness of the Foundation

- (i) to ensure that the necessary resources are provided and proper standards maintained for the protection of people and the Foundation's assets, giving particular attention to legal requirements, Health and Safety at work, maintenance and security of property
- (j) to co-ordinate the preparation of the annual budget and submit it to the Board of Trustees
- (k) to ensure that expenditure is controlled in line with the annual budget as approved by the Board of Trustees and to be responsible to the Trustees for the overall financial health of the Foundation
- (l) to foster good relations and develop effective partnerships between government, statutory and voluntary bodies, and other relevant Foundations

9. KEY OUTCOMES IN THE FIRST 12 MONTHS

Below are some initial indicators of the outcomes expected in the Foundation Director's first year. These are related to the current strategic plan which covers the 3-year period commencing in April 2021

- (i) To have an approved strategy and business plan in place for at least 3 years
- (ii) To have researched and compiled an effective Needs Analysis for the Wakefield Metropolitan District
- (iii) To have set and agreed targets for the endowment fund
- (iv) To have researched potential funding sources and established a coherent and viable fundraising plan for the endowment fund, including having identified key donors and a donor acquisition strategy in place
- (v) To have identified areas of risk for the Foundation and developed action plans for limiting these risks appropriately

10. RESPONSIBILITIES OF ALL STAFF MEMBERS

- (i) To be aware of the work of colleagues, trustees and volunteers in the achievement of the Foundation's strategic aims and objectives.
- (ii) To make oneself aware of, and comply with, all rules and legislation pertaining to Health and Safety at work.
- (iii) To work in accordance with the Foundation's approved Equal Opportunities Policy.
- (iv) To take an active part in communicating and co-operating with colleagues, Trustees and volunteers.
- (v) To follow approved guidelines, policies and procedures established by the Foundation in relation to financial management and personnel records.
- (vi) To take part in such working groups and committees or sub-committees as may be necessary for the proper fulfillment of the Foundation's strategic aims and objectives.

Person Specification

Introduction

The Community Foundation for Wakefield District is a small business with a big reach. The successful candidate must be experienced in running a small organisation whilst also being able to present to, and gain commitment from, influential people/organisations across the Wakefield District.

We are looking for someone who will be a passionate advocate for the Foundation and with enormous energy. He/she must be an extremely good communicator and influencer, with an ability to build and develop effective networks.

Essential

- Fundraising (ideally with expertise in corporate, high net worth or legacy campaigns)
- Income generation (developing new sources of income effectively)
- Business and staff management – including financial management and office administration (experienced in managing a budget of c. £1 million and 3-5 staff)
- Strategic planning and project development
- Networking – experience in developing effective networks of influential people
- Public speaking, or making formal presentations
- Deal making – able to ‘make the ask’ and sell concepts effectively

Desirable

- Managing a grant-making process
- Donor relationship marketing
- Business Risk assessment
- Experience in a complementary field – e.g. a grant-making body, regeneration initiative or another Community Foundation
- A good knowledge of the Wakefield Metropolitan District
- Demonstrable commitment to diversity in organisations, and/or experience in working with minority groups
- Experience in working with/servicing Boards or committees

COMPETENCIES

Management of a Foundation. Has the knowledge and experience relevant to the management of a Foundation, particularly developing and managing a secure and permanent endowment fund able to provide grant-giving in perpetuity, and working with the Trustees to develop and manage the fund.

Strategic Analysis and Planning; Leadership. Provides strategic direction for the Foundation, turns strategy into plans with milestones and measures. Facilitates and adds value to the strategic thinking of the trustees, wins support for agreed plans, and leads change in the Foundation as a whole by building teams and networks and involving and empowering staff. Advises the Chair about trustee recruitment and development.

Management. Understands the maturation process of organisations; appreciates the board/staff/Director roles and potential pitfalls. Has knowledge and experience of management including Trustee meetings, the supporting processes and paperwork, and the need to meet statutory requirements. Assesses the human and other resources needed to deliver the Foundation's objectives, sets them up and delivers efficient and effective services. Manages themselves with limited support.

High level of external focus and influencing skills. Sensitive to wider political and organisational priorities. Influences strategically, external individual bodies such as the Government, senior Civil Servants, statutory and voluntary bodies, other Foundations, the Media etc., in order to accomplish the aims of the Foundation as it grows.

Values/integrity. Takes personal responsibility for performance and delivery and has values compatible with those of the trustees of the Foundation. Seizes opportunities to develop long term strategic alliances and builds and maintains relationships. Has empathy with the issues of those seeking the Foundation's support. Advocates the Foundation's mission and strategic aims.

Professional and technical expertise. Has general management expertise and the knowledge and experience to analyse functional problems in depth; consider Finance, Personnel (including HR issues and employment legislation) Marketing/Sales and Public Relations, and Operations. Makes significant contributions to the thinking of the trustees and staff colleagues and volunteers.

Solution generation including innovation. Identifies options and alternatives when analyzing and determining solutions. Encourages others to think creatively and flexibly. Values innovative thinking.

Judgment. Exercises sound judgment in reaching evidence based justified decisions and options, whether originating from self or from others. Decisive even in times of change, challenge and ambiguity, taking measured risks as appropriate.

Negotiating Skills. Negotiates at a high level, with people from different professional backgrounds and disciplines, different cultures, people with emotional problems etc. Captivates audiences through message, style and delivery. Persuasive in written communications and face to face; attracting and distributing funds.

Drive and self-management. Owns responsibility for personal learning and development. Promotes opportunities for growth and to realise people potential. Demonstrates awareness of own strengths, weaknesses and motivation. Behaves with the energy needed to achieve the Foundation's strategic and key long-term goals.

Terms & Conditions

37.5 hours per week. No overtime is payable, but time off in lieu will be given where possible

6-month probationary period during which the post-holder must demonstrate a satisfactory level of performance

Notice period – 1 month during probationary period, 3 months thereafter

Holiday entitlement 25 days + 8 days public holiday

This post is pensionable in relation to the Workplace Pension Regulations

ME/me
April 2021