

**CHANGE  
COLLECTIVE**

# **GUIDE TO RECRUITMENT FOR SMALL CHARITIES**

**SMALL CHARITY RECRUITMENT JOURNEY - EMPLOYING YOUR FIRST FUNDRAISER**

# INTRODUCTION

Running a small charity is hard work, and you get used to doing everything yourself - you have to when there isn't a volunteer available with the skills and time, and you just don't have the money to pay others to do it. Making the decision to employ someone to help you with fundraising is a big one - you need the investment to pay off to keep running your services and not deplete your reserves.

The Chartered Institute of Fundraising is the profession's membership body. We know how important it is for you to find experienced and trusted fundraisers.

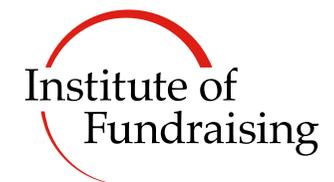
Our members include sole fundraisers working freelance with small and medium charities. We are working with our members and charities across the UK to ensure fundraising is, and is acknowledged to be, an equal, diverse and inclusive profession.

It is not uncommon for the **Small Charities Coalition** to hear of small charities being exploited and paying huge amounts for fundraising advice.

We have produced this guide, which is supported by the Small Charities Coalition, to help you identify what you need from a fundraiser and the different options for recruiting your first fundraiser into this role. It is primarily aimed at the smallest organisations operating under £350,000 a year.

The majority of the guide was written before the Coronavirus Covid-19 crisis and those principles, experience and guidance remain important. Additional elements have been added to reflect recruitment in a crisis.

You can skip through quickly by reading the hints and tips or you can delve deeper and read some of the expert advice and the lived experience of fundraisers. Further information is available for Chartered Institute of Fundraising members in the Hiring Manager guide.



# HINTS AND TIPS TO START YOUR RECRUITMENT JOURNEY

*Isobel Michael, Southside Family Project's sole fundraiser, and Chartered Institute of Fundraising Trustee and member of the EDI Committee, provides some hints and tips to start your recruitment journey based on her decades of work with small charities.*

## DO AND DON'T LIST FOR SMALL CHARITIES PLANNING TO EMPLOY THEIR FIRST FUNDRAISER

### ✓ DO:

1. Offer flexibility in working arrangements - consider part-time, flexible days/hours and remote working
2. Offer time and support for training and development alongside the fundraiser role to build skills, expertise and professional development
3. Set realistic expectations for the new role, allow time for the fundraiser to learn about the organisation, develop the case for support, fundraising strategy and plan; and recognise that you will need to provide clear project and financial information for the fundraiser
4. Value lived experience, particularly related to your cause, and the ability to draw from personal experience to bring insights to the organisation's fundraising and storytelling
5. Also recruit for fundraising experience at a governance level to help support the strategic development and management of fundraising
6. Develop a plan to measure outputs and outcomes of this new role

### ✗ DON'T:

1. Think that fundraising is easy - you'll need to recruit someone with the abilities needed to lead the fundraising for your organisation and support their ongoing training and development
2. Focus on short-term financial return, but invest time in working with the fundraiser to develop the tools and resources needed for effective long-term fundraising
3. Look for a 'well-connected' individual - expecting a fundraiser to bring a list of contacts is unrealistic and it's much more effective to hire a strong relationship builder to build a supporter base committed to your cause
4. Think that the fundraiser can work in isolation, they will need to work closely with your organisation's full team and particularly with the CEO/Director
5. Focus on a need for formal or length of experience - focus instead on ability, transferable skills and value less formal work experience

## ADVERTISING YOUR ROLE

Whether you are a small charity operating locally, across a wider area or even nationally you need to consider whether the postholder can work remotely or do they have to come into the office on a regular basis, and how much they need to know about your charity's area of work.

### BE CLEAR ABOUT THE JOB YOU ARE ADVERTISING:

- If location is not an issue you can look at recruiting nationally using sites such as **CharityJob, Third Sector, Guardian Jobs** and general sites like Indeed.
- If the role is local you should consider advertising through your local networks such as your CVS, job centre, community notice boards and your LinkedIn contacts.
- If knowledge about your charity's work is important, have you considered employing someone with lived experience and providing training? Opening up roles is one way of diversifying the sector, which leads to different ways of thinking and doing the work.
- Fundraising is high pressured work. Be realistic about what you can expect from someone working 1 or 2 days a week, or month, if your budget cannot stretch to a full time role.

### PLAN THE RECRUITMENT TIMETABLE BEFOREHAND:

- The advertising to closing date and interview should not be so long and drawn out that you lose good candidates.
- Decide who will be on the panel and prepare things together.
- What budget do you have for the advert? Including a logo may cost more but will bring brand awareness of your charity to a wider audience.
- Set out information about the charity, about the role and the recruitment timetable.

### TREAT CANDIDATES WITH RESPECT:

- Keep them informed.
- Be friendly and kind – do not ignore rejected candidates; inform them and provide feedback.
- Remember that candidates will remember you and your brand.

## FUNDRAISING JOB TITLES

Fundraising is the catch-all title used to describe bringing in the money for a charity and there is absolutely nothing wrong in using that as the title for your role. Some organisations may want to include elements of marketing and communications, including making presentations to individuals and groups. Finding the right title for the role for your organisation might attract people with different skills and experience and should broadly reflect the salary levels potential candidates associate with particular titles.

### ENTRY LEVEL AND JUNIOR ROLES:

- Trust Fundraising Administrator
- Junior Account Manager
- Development Administrator
- Community and Legacy Fundraising Assistant
- Community, Events and Fundraising Development Assistant

### MID-LEVEL ROLES:

- Fundraising Officer
- Development Officer
- Major Gifts Officer
- Statutory Funding Officer
- Community Fundraising Coordinator
- Corporate Account Manager
- Philanthropy Coordinator
- Prospect Research Executive
- Trusts and Foundation Fundraiser
- Trusts Programme Manager
- Corporate Partnerships Executive
- Prospect Research Executive

### SENIOR ROLES:

- Regional Fundraising Manager
- Regional Corporate Fundraiser
- UK Community Fundraising Manager
- Director of Fundraising
- Head of UK Giving and Engagement

# HOW CAN YOU CREATE A JOB AD THAT GOOGLE LOVES?



*This is an extract from a CharityJob blog written by Stephanie Dotto, Content and SEO lead at CharityJob*

Optimising your job ad for Google and tailoring it to your candidates are essentially the same thing. Ultimately, all Google cares about is matching the right content to the queries its users are searching. So, if you put in all the information you think a candidate would want to know about your job, then you're already making it Google-friendly.

Put yourself in the candidate's shoes. What would you want to know about a job you're thinking about applying for? And what might intrigue you to learn more about the organisation and click 'apply'?

## **HERE ARE A FEW THINGS YOU SHOULD ALWAYS INCLUDE IN YOUR JOB ADS:**

- **Location** - Candidates like to calculate things like commute times and costs, and this helps Google answer 'jobs near me' queries.
- **Base salary** - We know sometimes this can be a tricky one, especially for charities. But salary is important to candidates, especially if they're looking to advance in their career or want to know how much they could make shifting into the sector. You don't always have to make it visible on the front end, but a salary range needs to be included when you post the job (or else Google won't show it).

- **Job title** - If you have a unique job title (which many charities often do), our system will match it to a standardised job title which we share with Google. That means users will still find your role, even if they aren't searching for those exact terms.

## **OTHER THINGS THAT CANDIDATES WANT TO KNOW ABOUT:**

- **Employment type** - Full time? Part time? Contract? Make it clear right away.
- **Required skills** - The more skills you include, the faster a candidate will know if they're the right match for you.
- **Job benefits** - What do you offer that other charities might not?
- **Core values and company ethos** - This gives candidates a better idea of what your charity cares about and what sort of working environment to expect.
- **Equal opportunity statement** - Show that you're open to hiring every type of person.

# FUNDRAISING FOR SMALL CHARITIES - HOW TO OUTSOURCE YOUR FUNDRAISING

**Alexander Stevenson is the founder of Blume, a gig economy platform which matches experienced professional freelancers with charities who need help with specific tasks.**

Small charities typically have three ways to tackle fundraising, and none of them are particularly straightforward.

First of all, they can hire an experienced freelance consultant. Such consultants are expensive and, as ever with fundraising, there is no certainty of success.

Secondly, they can turn to less experienced fundraisers or to people – perhaps internally – who have no direct fundraising experience at all. This is cheaper to do but requires more investment of time to support the individual through the fundraising process. And of course, it may turn out that they do not have the right skills to fundraise effectively after all.

**“Some chief executives aren’t necessarily that good at fundraising or interested in doing it.”**

Thirdly, the chief executive can do all the fundraising themselves, taking their valuable time away from other areas of the charity and (whisper it!) some chief executives aren’t necessarily that good at fundraising or interested in doing it.

There is also a fourth way. As the gig economy becomes more sophisticated and more responsible, charities can confidently outsource many of the component parts of fundraising. Writing is the most obvious of these. Why agonise over a grant application or a marketing pitch when you can easily find an experienced writer to do it for you cheaply and quickly?

**“Why agonise over a grant application or a marketing pitch when you can easily find an experienced writer to do it for you cheaply and quickly?”**

You can also outsource the research (which foundations fit with your aims? Which businesses in your area are worth approaching?), putting together the database of your donors/target donors, organising fundraising events and coming up with any impact evaluations required by fundraisers.

It is worth remembering that the gig economy is a (slightly) different way of hiring people and as such requires a slightly different approach.

## HERE ARE SOME TIPS ON HOW TO APPROACH IT:

### 1. PICKING THE RIGHT TASK

Go through your organisation's to do list to identify what you need help with and why. Are you trying to free up the time of key people? Are you trying to bring specific skills into the organisation? Or do you simply need more short-term capacity? Tasks that are suitable tend to be self-contained, easy to brief (could you tell somebody how to do it in 15 minutes?) and have tangible outputs. Thus, writing a fundraising application/blog is a suitable task, asking somebody to write your fundraising strategy is not.

### 2. FINDING THE RIGHT FREELANCER

Typically gig economy platforms offer you the chance to search for candidates directly or post details of the task you want done. My preference is to search for candidates directly and email a handful of them - posting a task can bring an overwhelming number of responses. To narrow down your options you should read profiles and reviews on the platform and if the task is important then you should speak to the candidates personally. But don't agonise - at least not if it's a relatively inexpensive task. The joy of hiring via the gig economy is that you do not have to do the same due diligence as you would do for a longer term hire. If it doesn't work out then you can both move on.

### 3. AGREEING THE TASK

Again, don't agonise! Some people end up exchanging thirty emails to agree the outputs for a relatively small task. Not only is this a terrible waste of time, but it doesn't make the freelancer feel very trusted. If you are feeling unsure about the process, it can be helpful to break projects up into deliverable (and cheaper!) chunks rather than specifying lots of outputs right at the start. And if the task is so complex that it will take as much time to brief somebody as to do the task, then you should probably do it yourself.

### 4. MANAGING THE TASK

Although buyers often spend too much time specifying outputs before the project starts, they tend to spend too little time managing the project once it begins. It is easy to assume that because you've hired somebody remotely that somehow the project will magically happen without any input from you. But you should treat it like any other project and give feedback and support as the project progresses to get the best results.

### 5. MANAGING THE RELATIONSHIP

Treat your freelancer as you would any other colleague. Respond when you say you will, give feedback constructively and give them praise if they have done a good job. You may want to hire them again and if you can build levels of trust and understanding then the process of working with them will become more efficient, more productive and more pleasurable.

The gig economy is not cost-free nor is it hassle-free but if you are struggling to cobble together the time, skills and money to pursue an effective fundraising plan then it could be invaluable.

## DITCHING CVS AND COVER LETTERS



*This is an edited version of a blog written by Janet Thorne, CEO at Reach, in February 2020. You can read the full version at [reachvolunteering.org.uk/blog/ditching-cvs-and-cover-letters](https://reachvolunteering.org.uk/blog/ditching-cvs-and-cover-letters) Reach has been experimenting with a new approach to recruitment: abandoning CVs and cover letters in favour of three focused questions. It's worked really well for us. The process was fairer and more effective, and candidates liked it too.*

Recruiting a strong team is one of the most important things to get right, especially for a small charity. I've never been happy with traditional methods: application forms are cumbersome and shortlisting from CVs and cover letters seems too subjective and ineffective. Too often, I've found that a great applicant turns into a poor interviewee, or I worry that we missed someone with potential because of the volume of words we had to read. I was keen to try a more objective and focused process.

The approach that we followed is essentially borrowed from Applied ([beapplied.com](https://beapplied.com)) who make their excellent resources available for free.

### WHAT WE DID

We used this approach to recruit for two very different roles: a service administrator and a head of service.

We honed in on the essential attributes (a mix of skills, experience and qualities) and developed three questions designed to draw out those attributes. We put these questions up on **Survey Monkey** and put this on the job adverts. We asked for contact details and CVs; we kept this data hidden when shortlisting.

We reviewed all the applicants' answers to each question in turn, and scored all of them, before moving

on to the next question and so on. We then shortlisted for interview, based on these scores.

***"Too often, I've found that a great applicant turns into a poor interviewee..."***

### WHY WE DID IT

#### REDUCING BIAS

Unconscious bias tends to creep into the selection process. Doing it this way removes much of this bias at the application stage:

- **Blinding** - by viewing answers without any other contextual data, you are forced to judge candidates on their answers only
- **Chunking** - by viewing answers in isolation, you avoid the 'halo' effect where you start marking a candidate up (or down) because you feel strongly about their previous answers
- **Randomisation** - by viewing answers in different orders, no one candidate gets unfairly penalised by fatigue.

## LIVED EXPERIENCE

By Janet Thorne

***“It’s really hard work sifting through CVs and cover letters and making sensible judgements.”***

### MAKING THE PROCESS MORE EFFICIENT

It’s really hard work sifting through CVs and cover letters and making sensible judgements. You can expend quite a lot of time eliminating applications where people just bulk apply with little thought, or where they do not meet essential criteria.

### INCREASING THE CHANCE OF SHORTLISTING THE BEST CANDIDATES

I was first motivated to try this approach for the entry level role because CVs and cover letters seem a particularly random and unfair way to judge people who are only just starting on their careers. It was so effective in highlighting the actual abilities of candidates that we decided to use it for our senior role too.

The process cuts out the noise and sharpens the focus for both the candidate and the recruiter. While CVs can be misleading, a well designed ‘work sample’ is the best test of candidate’s ability.

### WHAT HAPPENED

For our service administrator role, we had a very strong response: over 100 candidates; about 70% decent application. Shortlisting itself was far easier than in the past. It was easier to weed out the poor applications and get a much clearer sense of what different candidates could bring.

We were unable to appoint for our head of service first time round so we had to run a second round of recruitment. We received roughly 40 applications each time, and almost all strong.

The first time, we did not look at CVs until we met candidates for interview. We then discovered that we had shortlisted a good number of people who were very bright and full of potential, but who simply didn’t have the experience and seasoned judgement to be able to carry out a senior leadership role. We realised that we had underplayed experience in favour of qualities like openness to learning.

We tweaked the application to emphasise relevant senior experience and did our first sift on that question alone. We then scored the highest-ranking candidates for answers to their other two responses. This gave greater weight to candidates’ relevant experience and was more efficient. Once we’d created a shortlist, we reviewed CVs as a way of triangulating. This produced a more balanced shortlist.

***“Honestly, ditching CVs and cover letters did feel a bit scary...”***

### WHAT WE LEARNT

#### IT IS A BIT SCARY

Honestly, ditching CVs and cover letters did feel a bit scary when we recruited for our head of service because it’s such a key role for us, and traditional methods felt more familiar. But the evidence for this approach is compelling.

## LIVED EXPERIENCE

By Janet Thorne

### IT IS A MUCH MORE EFFECTIVE WAY TO SHORTLIST THE BEST CANDIDATES

The process makes it easier to focus in on the key qualities that you need. Candidates focus their applications only on these attributes, and do not include irrelevant details. And it is much easier to compare candidates' answers to questions than it is to compare cover letters and CVs.

The approach is perfect for roles which require little previous experience. It also worked really well for a more senior role but you need to focus your questions and the process to ensure the right balance between experience and potential.

### IT REALLY DOES RADICALLY REDUCE BIAS

Viewing candidates' answers without any contextual data, such as where they've worked or details of their education, means that you just focus on the attributes you've prioritised. Seeing each response in isolation means that you cannot build up a mental picture of a candidate (and if you are like me, start willing some to do well because you liked one of their previous answers).

***"You need to be crystal clear about the attributes you are looking for, and prioritise ruthlessly."***

### YOU NEED TO INVEST MORE TIME UPFRONT

It will certainly save you time down the line, but you need to invest more time and effort at the outset. You need to be crystal clear about the attributes you are looking for, and prioritise ruthlessly (no more than six!).

You then need to design questions that test these attributes well. A lot hangs on getting these questions right.

***"Confidence in fairness encourages more people from under-represented backgrounds to apply."***

### CANDIDATES REALLY LIKE IT

We were worried this approach might put people off, but they really liked it. Many candidates spontaneously gave us positive feedback, saying that it felt more relevant than doing a traditional CV and cover letter and gave them a chance to really highlight why they felt they were right for the role. A few even claimed to have enjoyed the process.

Quite a few said that it gave a good impression of Reach. This is important for us, given how competitive the job market is.

Most significantly, candidates said the process felt transparent and fair. This may turn out to be one of the biggest benefits of this approach, especially if confidence in fairness encourages more people from under-represented backgrounds to apply.

With thanks to [Applied](#) for letting me pinch their resources and ideas.

## WHAT QUESTIONS DID WE ASK?

I want to emphasise that these questions sit within a process (define the attributes, design questions to test these attributes, create a marking rubric to assess answers). And we are learning as we go, so our questions are definitely not perfect! I'd recommend following the **Applied** guide to designing work samples.

### HEAD OF SERVICE ROLE QUESTIONS

1. Why are you a great fit for this role? Please reference the person specification and draw on your track record of leading and developing a service circa 300–500 words. **This question is a little like a traditional cover letter, but worked better because it elicited responses focused solely on attributes in the person specification with an emphasis on their experience of service management.**
2. Give an example of an improvement you have made to a service you have managed – what steps did you take and how did you assess the success? circa 200–400 words. **To test: user focus, outcome focus; openness to learning.**
3. Suggest a partnership that could add value to Reach. What value would it bring? How would you set about developing it? circa 100–200 words. **To test: ability to develop & maintain partnerships, strategic thinking, understanding of needs of sector.**

### SERVICE COORDINATOR ROLE QUESTIONS

1. Why are you interested in this role? To test: enthusiasm for role and for Reach.
2. We devised a customer service scenario. To test: customer service skills. This question did not work very well.
3. Describe an achievement that you are particularly proud of. It can be from your experience of work, education or volunteering. **To test: Self-motivation and ability to use initiative, effort in work, responsibility and reliability; positive can-do attitude. This question worked really well.**

# LOOKING BEYOND TECHNICAL SKILLS AND EXPERIENCE TOWARDS A DIVERSE AND VALUE-BASED WORKFORCE

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*The 'Get Hired' programme from Prince's Trust places an emphasis on hiring for potential and values – Rebecca Buchanan sets out her approach.*

Recruitment isn't easy, for the employers or employees. It's a complex landscape of reading or writing numerous CVs and cover letters sprouting various educational achievements and employment highlights. However, in an ever-changing world, these skills we now covet are unlikely to be important in ten years' time. So, how do we choose the right person amongst a sea of potentially viable people?

We bring it back to values. Every person, young or old, has values that shape their behaviour. Values that can make them worth investing in.

Value-based hiring is about looking beyond the technical skills and experience listed in someone's CV.

**Prince's Trust Get Hired** have encouraged value-based recruitment by delivering 'Get Hired Live' events. Personal values and behaviours of young people are aligned with the workplace values of the hiring company, something that is not possible through a purely CV-based or competency-based approach.

Whilst, we endeavour not to undermine technical or 'hard' skills, there should be an emphasis on the fact these can be learnt and will vary with importance over time. Additionally, by shifting the focus away from CVs, experience and academic credentials, you can significantly improve the diversity of your organisation.

***"There are numerous reasons why diversity delivers such big returns but two of the biggest reasons are innovation and customer insight."***

Put simply, diversity – whether gender, ethnicity or culture – is great for business.

Endless statistics, some of which can be found in Prince's Trust Get Hired latest whitepaper, show that ensuring your company is diverse creates a winning formula.

There are numerous reasons why diversity delivers such big returns but two of the biggest reasons are innovation and customer insight. Mixing a range of perspectives and life-experiences are the vital ingredients for driving innovation, eliciting new ideas and fostering creativity. All important for fundraising and connection to donors.

Additionally, customers are very unlikely to be one homogenous group. Creating a workforce that is representative of your customer base makes for a more relatable organisation.

## EXPERT ADVICE

By Rebecca Buchanan

So, how do you go about creating a diverse, value-based organisation? Firstly, assess your current values. Let them evolve and be clear with any potential hires that you will hold these values high above all else.

Workplace diversity has become a must-have for any organisation looking to grow and compete. However, simply having a diverse workforce isn't enough; it needs to be accompanied by an environment where all employees – regardless of gender, age or ethnicity – feel they can share ideas and are empowered to take them forward. Make sure everyone at your organisation fully understands the benefits and commits to championing a diverse workplace.

It is only when diversity is combined with strong values and corporate culture that the benefits can be fully realised.

***“Make sure everyone at your organisation fully understands the benefits and commits to championing a diverse workplace.”***

### GUIDE POINTS

1. Review your job descriptions and person specifications. It sounds simple but you may now want more or different digital competencies, for instance.
2. Consider which roles can work from home, even when the office re-opens. This will allow you to recruit from a wider geographical area, wider range of disabled people and those with caring responsibilities.
3. Review your emergency working from home procedures to ensure health and safety, insurance, expenses, equipment and furniture, cyber-security and confidentiality is maintained.
4. Do not assume everyone can or wants to work from home permanently. What has been possible in a crisis may have placed an additional stress on colleagues – not everyone has the luxury of space to create a dedicated home office.
5. How will you ensure your remote working existing colleagues and new hires are not disengaged from office/physical workspace colleagues?

## WHAT DID YOU DO IN THE CRISIS?

- You may be tempted to ask candidates to tell you what they did in the crisis, think carefully what you want to know and why – does it add to your understanding of their competence?
- Be aware of potential bias towards candidates who worked through, volunteered, took up training courses – not everyone will have had the choice, time or capacity.
- Candidates who were not furloughed may have been given additional responsibilities and will naturally want to present this. These opportunities may not have been spread evenly across all equality groups.
- Be sensitive to candidates who were furloughed: it may not have been their choice; they may have been shielding; they may have had caring responsibilities.
- Some candidates will have lost friends or families to Covid-19 and may not want to talk about this time.
- Some people will have lost their jobs, or have been in the group of new starters not eligible for furlough.



## RECRUITMENT DURING AND AFTER THE CORONAVIRUS CRISIS

We all have new perspectives about what our work is, what it needs now and we're buzzing with ideas and worries about what the future opportunities and threats will be. We've had to learn a whole new language for HR (furlough) and working from home (Zoom or Teams, anyone?). Some organisations may have temporarily halted recruitment but others have continued.

Falling back into old ways of working after the crisis is over may be tempting but you will lose the opportunity to make changes to your equality, diversity and inclusion intentions on recruitment and not entrench existing inequalities. You will have to recruit again and the Covid-19 crisis provides you with the knowledge, experience and skills to do it differently.

## DIGITAL IS WHERE IT'S AT

- You will have already advertised roles using digital media – review this and see how you can improve how you present yourself.
- Now that you're familiar with tech for meetings you can use this for interviews – choose your tech and write some guide notes for candidates so that they can prepare to use your choice of tech prior to the interview.
- Prepare for the interview by dressing as you would for a face to face interview, ensure the lighting is good and the sound is working, that you have a quiet, secure space and that the internet connection is working.
- Don't forget EDI: will the candidate need to use a sign language interpreter? Is the information in text reader formats? Just as you would for face to face, find out what the candidate needs.
- Log in ahead of the interview so that the candidate is not left in the 'lobby' too long.
- If you are using the same link for all candidates make sure you allow enough time between interviews so that candidates don't meet, as you would for a face to face interview. Unlike a face to face interview candidates might come into the 'room' early; it would be better to create new links for each candidate.
- Make sure you have a number to call or text candidates in case of technical problems and ensure they have a way of contacting you.
- Your tech choice may allow you to record the interview. You should inform candidates if you are planning to record and how you will be using the recording. It gives you the opportunity to carry out a one to one shorter, initial interview that other panel members can review to decide the final candidates to invite for a fuller interview.
- Candidates can present through sharing their screen but this is easier on a computer/laptop than on a phone. Check what candidates will be using and adjust as necessary, e.g. sending the presentation ahead of the interview for you to share on the screen.
- The panel chair should invite panel members to ask their questions and agree signals to ask follow-up questions or seek clarification.
- Remain present and attentive throughout the interview, but muted if you're not speaking.

### **YOU MAY DECIDE TO NEVER GO BACK TO THE OLD WAYS.**

## RESOURCES

**Isobel Michael, Southside Family Project's sole fundraiser and Chartered Institute of Fundraising Trustee and member of the EDI Committee, sets out exactly what you need in your job description and person specification.**

### MODEL JOB DESCRIPTION AND PERSON SPECIFICATION FOR AN ORGANISATION'S FIRST FUNDRAISER

#### LANGUAGE SHOULD:

- avoid jargon, unexplained acronyms and abbreviations
- be easily understandable (guidance available on the Plain English Campaign website: [plainenglish.co.uk/free-guides.html](http://plainenglish.co.uk/free-guides.html))
- be inclusive (don't use words that marginalise groups of people who may be consciously or unconsciously discriminated against)

#### WHEN ADVERTISING

- emphasise the opportunity to work closely with the CEO/director to develop and drive the organisation's fundraising strategy and play a key role in the organisation's development
- emphasise the support that will be provided with training and development (linked to the Chartered Institute of Fundraising Academy, Mentoring Programmes and support through Regional and Special Interest Groups)

### JOB DESCRIPTION

- JOB TITLE:** Fundraiser (if using an alternative title, ensure it is sex and age neutral)
- SALARY:** Be clear about the salary range and don't then offer a salary below the advertised range. **Check latest Charity Sector Salary Report** (2019 Charity Salary Report identified a national range of £26-31,000 for an officer/exec role for general fundraising in smaller charities and £24-29,000 for an officer/exec role for community fundraising). *Include details of hours, flexible working options, leave, pension etc.*
- REPORTING TO:** Be clear about the post to whom the postholder is responsible
- MANAGING:** Be clear about any posts (including volunteers) reporting to the postholder
- MAIN PURPOSE OF THE JOB** The fundraiser's role is to deliver the organisation's fundraising strategy, to develop and diversify the base of supporters and to achieve fundraising targets working with the CEO/director and staff team, supported by the board of trustees

## **MAIN DUTIES AND RESPONSIBILITIES**

- Deliver the organisation's fundraising strategy, working with the CEO/director and key stakeholders, and contribute to its development
- Ensure that cases for supporting the organisation, relevant to each different funding source, are developed, regularly updated and relevant
- Ensure effective systems, processes and legal requirements for fundraising are in place and adhere to the Code of Fundraising Practice and Fundraising Regulator requirements
- Ensure that all donors are thanked in a timely manner, and supported through regular and appropriate communication
- Manage and record information about supporters, donations and fundraising activity, in line with the organisation's Privacy Policy
- Undertake training and mentoring opportunities to ensure continuing professional development

## **RESPONSIBILITIES FOR DIFFERENT FUNDING SOURCES (SELECT AS APPROPRIATE)**

- Trusts and Foundations/Statutory: research potential funding opportunities; work with the CEO/Director and relevant staff on the development of applications/proposals, building relationships with and reporting to supporters
- Trusts and Foundations/Statutory: ensure each funding application/proposal meets the criteria, deadlines and requirements and represents the values of the organisation
- Individuals: promote tax effective giving opportunities and other ways to donate to individuals; build relationships with supporters at all levels, working with the CEO/director on major gifts
- Community: recruit and support volunteers to undertake and promote community fundraising; promote fundraising opportunities to individuals and community groups to raise awareness and inspire them to undertake fundraising activities and support the organisation
- Events: support individuals/groups to organise and participate in fundraising events and ensure that all third-party events adhere to the Code of Fundraising Practice and other relevant requirements
- Corporate: promote corporate fundraising opportunities, engage with and develop relationships with companies and staff teams
- Legacies: promote legacy giving and the importance of gifts in wills for the long-term development of the organisation
- In memory: provide sensitive support for individuals/families who wish to donate or fundraise in memory of a loved one, with ongoing supporter care and engagement

## PERSON SPECIFICATION

### KNOWLEDGE

ESSENTIAL	DESIRABLE
<p>Understanding of the organisation's aims and values</p> <p>Working knowledge of Microsoft Office (or other software as appropriate) and the internet (or ability and commitment to develop these skills)</p>	<p>Knowledge of the voluntary sector and the fundraising environment</p> <p>Chartered Institute of Fundraising training and/or membership</p> <p>Knowledge of the Code of Fundraising Practice</p> <p>Understanding of confidentiality issues and GDPR (General Data Protection Regulation)</p> <p>Knowledge of Gift Aid and other tax effective giving mechanisms</p> <p>Knowledge of fundraising techniques for specific funding sources (detail as appropriate)</p>

### ABILITIES

ESSENTIAL	DESIRABLE
<p>Ability to communicate effectively to inspire and motivate a wide range of stakeholders</p> <p>Ability to build relationships and work with a diverse range of people</p> <p>Ability to be proactive in identifying and acting on funding opportunities</p> <p>Ability to prioritise and meet deadlines</p> <p>Ability to work effectively in a team and independently</p> <p>Ability to maintain accurate records</p>	<p>Ability to think strategically</p> <p>Ability to assess return on investment for different fundraising activities</p>

## PERSON SPECIFICATION

### EXPERIENCE

ESSENTIAL	DESIRABLE
Experience of building relationships with a broad range of individuals and groups	Previous experience of working in a fundraising role
Experience of collating information and preparing proposals and reports	Experience of developing fundraising strategies
Experience of managing multiple projects or activities	Experience of volunteering and/or working with volunteers
Experience of successfully working towards agreed financial targets	

### APTITUDES

ESSENTIAL	DESIRABLE
Commitment to the organisation's aims and values (lived experience would be an asset)	Organised and self-motivated
Resilience	Willingness to work flexibly
Attention to detail	
Willingness to undertake training and mentoring as appropriate	
Commitment to equal opportunities and anti-discriminatory practices at work	
Empathy and high level of personal integrity	

The Chartered Institute of Fundraising is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 640 organisational members who raise more than £10 billion in income for good causes every year, and over 6,000 individual members.

For more information, please visit:

[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

