



HEAD OF MAJOR GIFTS AND TRUSTS

Information for applicants

February 2020

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WELCOME



Thank you for your interest in joining Norwood and for wanting to play a key role in our engagement with our key supporters.

You will be joining us at the start of something new, following a realignment of our fundraising strategy and the establishment of a new structure that focuses on developing stronger and more meaningful relationships with our donors.

Our engagement with the community is, and always will be, the bedrock of our support.

Norwood is fortunate to enjoy the long-standing support of some of the leading philanthropists in the Jewish community, as well as generous support from individuals across the community.

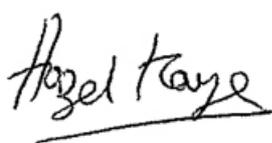
We believe that every child, whatever their ability or circumstance, deserves the best start in life and we also believe that people with learning challenges have an equal right to enjoy independent, meaningful and inclusive adult lives.

To this end, our dedicated multi-disciplinary teams work hard – day in, day out, every day of the year – to ensure that we can provide life-changing services to thousands of people every year. But we can only do this with sufficient funding.

In a time of reduced statutory funding, voluntary donations are now more precious to Norwood than ever before. And it is only through the success of our fundraising efforts that we are able to provide our invaluable support.

The Head of Major Gifts and Trusts is a new role and reflects the relationship approach to fundraising that is fundamental to our approach to engaging with our major donors and Trusts and Foundations. Your task and opportunity is to develop and cement long-term mutually beneficial partnerships with our significant donors while at the same time working with your colleagues to cultivate our supporters of the future.

I look forward to hearing from you.



Hazel Kaye

Director of Transformation



ABOUT NORWOOD

Founded in 1795, Norwood is at the heart of the Jewish community where those with learning disabilities are not just included but also considered valued members.

Families turn to Norwood as the first port of call, knowing we will be there during difficult times.

Through our services, families are enabled to stay together, children are supported, and those with learning challenges are provided with support and equal opportunities at every stage of their lives, giving parents reassurance for the long term.

What we do

Children's services

We have a multi-disciplinary team of practitioners and a family of services designed specifically to support vulnerable children and their families, and children with special educational needs.

We don't just consider the needs of the individual child or young person but also the whole family, recognising the impact that disability has on everyone.

Our social work service offers practical support, advice and information to parents to enable them to cope better with their child's needs and support them in other ways.



We also run weekly support groups, where parents can share personal experiences and challenges in a confidential, non-judgemental and safe space with people who understand their feelings and what they are going through.

Our parenting programmes support parents to raise happy and successful children. For example, our 11-week Strengthening Families, Strengthening Communities course enables parents to learn techniques to manage their children's behaviour, set boundaries, build better relationships with their children, gain information and strategies, and develop confidence in their parenting.

Norwood's benefits and welfare advice service provides advice on a wide-range of topics – from benefits to debt; employment to housing.

Our Siblings' Group offers children, who have a brother or sister with special educational needs or disability, a safe space to express their feelings, share experiences with young people facing similar situations, make friends and have fun.

Norwood plays a crucial role in ensuring that the support we provide, across all our services, means that the rest of the family can enjoy a quality of life that many other families take for granted, safe in the knowledge that their loved one is being well cared for.

Find out more about our [children's services](#).

Adult services

Norwood provides a wide range of quality services, where there might otherwise be none, to people from the Jewish and wider community.

Our dedicated and highly skilled teams work not only with the people we support but also their families to ensure that they are involved in decisions about their son/daughter or brother/sister and can play an active role in deciding how our services are run.

Within our services for adults with learning disabilities, we provide a range of accommodations to enable people to live the life they choose. Anyone aged 18 and upwards who has a learning disability and is eligible for social care support may live in one of Norwood's residential or supported living homes.

We can also provide outreach support to those who live in their own homes.

Find out more about our [adult services](#).



Fundraising

There is no hiding from the fact that Norwood, like all charities, operates in challenging and uncertain economic times.

In 2018/19, we generated £31.9 million. Despite representing only a modest increase on the previous year, it was encouraging and helped to offset some of the 3.5 per cent decrease in local authority funding. The final position reflects the positive steps made during the financial year to boost income and reduce costs.

Behind this was the success of our voluntary and traded income, which increased by 10 per cent to £11.4 million in 2018/19. A significant contribution to this was the increase in legacy income to £2.3 million and the result of excellent work in previous years. But we all know that legacy income cannot be guaranteed and can never be taken for granted.

It continues to be the case that about half of our earned income is derived from voluntary sources and principally philanthropic giving by our patrons and major donors, the success of our regular appeals, corporate events and our all-important annual dinner, which is the highlight of our annual fundraising calendar. We also secure funding from charitable foundations, legacy donations, Challenge events and our charity shops.

Maintaining and deepening our existing relationships with our key supporters is an essential requirement and foundation for future growth. There is further potential that we need to maximise, but a relationship-approach to long-term and mutually beneficial partnerships with donors is fundamental to everything we do.

Find out more about our [fundraising](#).

Young Norwood (YN)

Young Norwood is our charitable platform for recruiting and developing young lay leaders within the Jewish community.

Founded in 1993, YN has almost 3,000 supporters aged between 21 and 35. The aim is to mentor and develop young lay leaders in all aspects of communal and charitable work, including organising and promoting fundraising events, leveraging their networks, volunteering and raising awareness of the charity and its charitable purposes.

YN also offers a programme of high-profile social and business events, which give our young lay leaders the opportunity to generate funds to support the charity's vital work.

For more information

There is a wealth of information on our [main website](#)

Read our latest [Annual Report 2018-2019](#)

CONTEXT FOR THE APPOINTMENT

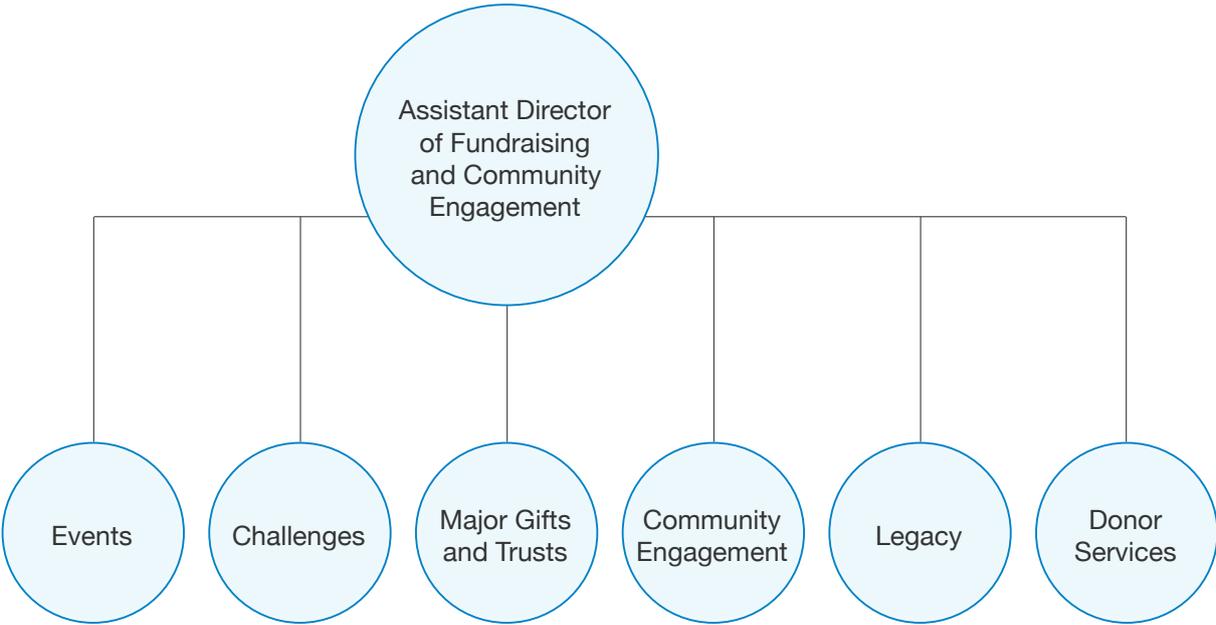
The Head of Major Gifts and Trusts is a new position and a key member of the fundraising leadership team.

The purpose of the role is to provide clear point of contact for some of our most significant individual donors and Trusts and Foundations and to ensure that we steward these relationships effectively and derive maximum lifetime benefit.

Along with your major partnership fundraising credentials you will also need to be able to demonstrate an understanding of the UK Jewish community. This is not just the values, traditions and beliefs that underpin both family and communal life but also how these shape the character and patterns of philanthropic giving by the community.



ORGANISATIONAL CHART



JOB DESCRIPTION

Job title:	Head of Major Gifts and Trusts
Accountable to:	Assistant Director of Fundraising and Community Engagement
Salary:	£55,000 – £60,000 (depending on experience)
Location:	Stanmore
Hours:	35 hours per week
Contract:	Permanent

Job overview

Working together with the Assistant Director of Fundraising and Community Engagement, develop the strategy for the Major Gifts and Trust campaign and be responsible for implementing it. Working with your team, ensure stewardship of our Major Donors and Trusts and that cultivation plans are put in place and implemented. To be jointly responsible, with the Head of Events, for the income of the Annual Dinner, corporate events and other events involving major donors.

Main duties and responsibilities

1. To work with the Assistant Director of Fundraising and Community Engagement to develop a major gifts strategy for Norwood to substantially increase income from major donors and Trusts. Deliver plans against agreed targets, monitoring, evaluating and reporting as necessary.
2. To implement and manage the major donor strategy for both revenue and capital projects and to oversee the management of research into major donor prospects.
3. To manage a portfolio of major donors and potential major donors in order to canvass, develop long term relationships and maximise income across



all streams; donations, events, brochure advertising, challenges and sponsorship etc.

4. To be responsible for achieving the income target for your portfolio of donors and supporting your team to achieve their targets.
5. To have overall responsible for the donation income (pre, during and post) for each event and together with the Head of Events jointly responsible for achieving the overall income target for each event.
6. To train, brief and liaise with key contacts throughout the charity, including Chief Executive, Directors and Trustees, to develop relationships with existing, potential major donors, trustees and council in order to access their networks and to develop them as peer-askers.
7. To optimise return on investment across all activities through effective management, consistent delivery of an excellent supporter experience and proactive marketing.
8. To represent Norwood at a senior level in front of key contacts (e.g. Ambassadors, celebrities, major donors and corporate partners).
9. To work closely with senior Norwood personnel to devise and deliver a series of cultivation events – enabling the charity to develop and nurture relationships with influential individuals and organisations.
10. To work collaboratively with other members of the Fundraising Team, undertaking duties which contribute to the team's effective working.
11. To lead, line manage and support the Major Gifts and Trusts team ensuring performance management of staff and their on-going personal development to enable them to reach their maximum potential within Norwood.
12. To develop a selection of major donor lay leaders who are able to act as ambassadors for Norwood and make introductions to major donor prospects via their peer links.
13. To develop face-to-face relationships with major donor prospects, asking them for high level financial support (or facilitating someone else to make the ask) and providing them with the highest possible level of supporter care.
14. Source relevant project information in order to compile detailed funding proposals for major donor prospects where appropriate.
15. To develop and implement solicitation plans for major donor prospects, highlighting key communications and programmes for involvement so that prospects are actively engaged with the work of Norwood. Develop and



implement stewardship plans in order to provide timely and appropriate feedback for major donors on projects that they have funded.

16. Where relevant, make arrangements for prospects and donors to visit the work of Norwood.
17. To devise and write clear procedures on how major donor leads and relationships are managed at Norwood.
18. To be responsible for ensuring that procedures relating to major donor fundraising are adhered to throughout Norwood and address any issues where they are not followed.

General

1. To take all reasonable care of the health and safety of him/her self and of other persons who may be affected by his/her acts or omissions. As regards to any duty or requirement imposed upon the organisation by or under any of the relevant statutory provisions, to co-operate with the organisation as far as it necessary to enable that duty or requirement to be performed or complied with.
2. To work at any other Norwood location, as and when required.
3. To report to the Health and Safety Manager either serious risks or your concerns over safety issues.
4. To maintain confidentiality at all times and to ensure respect for, proper observance of and adherence to Norwood's confidentiality policy for all staff.
5. To attend regular supervision sessions with line manager, regular team meetings and undertake relevant training as and when required.
6. To work collaboratively with volunteers to ensure that their contribution enhances quality of service provision and support across the organisation.
7. To undertake any other duties which are consistent with the post.
8. To maintain standard of dress that is appropriate to role and in accordance with the organisation's dress policy.

This job description is not an exhaustive list of duties and responsibilities and is subject to change in accordance with the needs of the service.

PERSON SPECIFICATION

Essential experience

- Experience of developing relationships with major donors and major donor prospects.
- Experience of achieving significant major donor gifts.
- Experience of writing, developing and taking responsibility for strategic plans.
- Experience of working with a wide range of individuals at a senior level.
- Experience of working with a major donor appeal board.

Desirable experience

- Experience of working in a medium-to-large sized charity.
- Experience of capital appeals fundraising.

Qualifications

- Business or other relevant degree.

Essential knowledge

- Thorough knowledge of UK wealth sectors and major donors already in the field.
- An excellent understanding of the requirements for a highly successful major donor fundraising programme.
- Substantial and proven experience of major donor fundraising.
- An understanding of charity law in relation to major donor fundraising.
- Line management experience.

Personal circumstances and attributes

- To work occasional evenings and weekends in line with the needs of the role and the wider Organisation.
- The ability to plan time effectively and to organise oneself well.
- The skills to maintain the balance between working independently and as part of a team.

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- Able and willing to be flexible in approach to work and responsive to changing demands of the service and clients.
 - Able to undertake daily work efficiently and remain focused on longer term vision.

Other

- Car owner/driver. Ability to use own car for business purposes (desirable).

WORKING FOR US – EMPLOYEE BENEFITS

35 hours per week 9-5.30 Monday to Thursday and 1pm finish on a Friday

21 days annual leave plus bank holidays. This rises by 1 day per year to a maximum of 28 days

Offices are closed on the Jewish high holy days, the dates of which vary from year to year

Company sick pay (this kicks in after probation period of 6 months), starting at 4 weeks, rising to a maximum of 12 weeks

Pension scheme

Access to Employee Assistance Programme

Cycle to work scheme



HOW TO APPLY

Application and selection process

For an informal discussion about the role, please contact our recruitment partners, NFP Consulting:

Simon Lloyd Director | NFP Consulting
07961 988 523 simon.lloyd@nfpconsulting.co.uk



Apply online www.nfpconsulting.co.uk/norwood/norwoodheadofmajorgifts

Application is by way of CV and a Supporting Statement.

Closing date: 10am, 2nd March 2020

There is a two stage selection process.

Stage 1: Tuesday 10th March or Thursday 12th March

First round of screening interviews conducted by NFP Consulting, which will take place in Stanmore.

Stage 2: Tuesday 17th March

Candidates taken forward from the first round will be invited to complete online psychometric assessments prior to the final panel interview.

The formal panel interview will include a pre-prepared presentation task.

Both interview stages will take place at Norwood's Head Office in Stanmore.



Accessibility

Please let us know if you have any special requirements which we might need to consider in relation to any aspect of the selection process, e.g. attending interview, attending the assessment day, completing online exercise. Any requests will not be taken into account in the selection process.

Please let us know if you would like to receive this information in a different format.