



# Business and Funding Development Manager

## Job pack

Thanks for your interest in working at Purbeck Citizens Advice (PCA).

This job pack should tell you everything you need to know to about the role, how to apply and what it means to work at PCA. You will find:

- Job Description and Person Specification
- Our values
- 3 things you should know about us
- Information about the team, organisation and role
- The role profile and person specification
- The benefits of working at PCA
- Our approach to equality and diversity
- Guidance on completing your application

### **Want to chat about this role?**

If you'd like to chat about the role, please contact [chiefofficer@purbeck.cabnet.org.uk](mailto:chiefofficer@purbeck.cabnet.org.uk)



# Job Description

Job Title	Business and Funding Development Manager
Reporting to	PCA Chief Officer Citizens Advice in Dorset (CAiD) members
Salary & contract term	Based on NJC scale 23: £27,741 pa. Full time; 37 hours pw. Annual leave 28 days per year plus bank holidays. 1-year fixed term contract initially, potential to extend
Location	Home working with flexibility to work in one of our offices in Purbeck when C-19 guidance permits.
Team overview	A part of the PCA Senior Management Team (SMT) which includes: Chief Officer, Project Manager, Advice Service Manager, Volunteer Development and Training Manager. Also, part of the CAiD organisation supporting the four-member Local Citizens Advice (LCA) offices.
Role overview	<ul style="list-style-type: none"> <li>• You will develop income from a diverse range Trusts, Foundations, Statutory bodies and other funders.</li> <li>• You will identify future business development, networking and funding opportunities securing new and existing services.</li> <li>• You will write and submit compelling applications and proposals to funders in support of our organisational objectives.</li> <li>• You will support the CAiD Managers in helping to drive the Services' income generation strategy.</li> <li>• You will be responsible for using the existing research and development data held by the four LCAs, and establishing a new corporate database of potential funders and donors.</li> <li>• You will lead a team of volunteers to support our fundraising efforts including identifying need and developing the business case and provide support to the wider SMT and other staff to meet our business development plans.</li> </ul>

Main responsibilities	Key elements/Tasks
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Business development and fundraising	<ul style="list-style-type: none"> <li>• Develop, deliver and refine the business development and fundraising strategy.</li> <li>• Maximise the completion of larger scale government bids as efficiently and effectively as possible.</li> <li>• Build a strong network of external contacts and maintain a central database to record donor contact and preference information.</li> <li>• Make risk analyses and balancing time-cost ratios to focus effort on the fundraising activities that are most appropriate and will have the highest chance of success.</li> <li>• Write and submit compelling and successful funding applications and proposals.</li> <li>• Work with colleagues in the PCA Senior Management Team and wider Citizens Advice in Dorset (CAiD) members to develop your knowledge and understanding of the business to inform business development and stakeholder relationships.</li> <li>• To support the start-up, management and development of new business opportunities.</li> <li>• Work with managers and others to develop sustainability and replacement funding of existing projects and programmes.</li> <li>• Lead and supervise fundraising volunteers to carry out various income generation functions within the four CAiD member LCAs.</li> <li>• To be an active member of the PCA Senior Management Team in meetings and provide leadership to the organisation.</li> </ul>
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Other Duties & Responsibilities	<ul style="list-style-type: none"><li>• Prepare written reports on areas of business development as needed</li><li>• Attend Trustee Board and committee meetings as needed</li><li>• Represent the organisation at external events and stakeholder meetings</li><li>• Demonstrate a commitment to our values and principles on equality, diversity and inclusion</li><li>• Provide cover for colleagues in the PCA Senior Management Team as needed.</li><li>• Any other responsibilities as reasonably required.</li></ul>
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## Person specification

### Knowledge and Experience

#### Essential

- Experience of working in successful partnership or business development role
- Excellent knowledge of stakeholder management and developing relationships
- Experience of working effectively with a range of commissioners and funders and other stakeholders
- Demonstrable experience of successful fundraising and business development
- Proven knowledge of the third/voluntary sector fundraising environment

## **Skills**

- Excellent negotiation and communication skills with the ability to build trust and negotiate with a range of stakeholders and audiences
- A proven commitment to continuing professional development, learning from actions and continuous improvement.
- Excellent written skills with the ability to make compelling funding proposals, applications and reports.
- Excellent organisation skills and able to manage multiple relationships and funding proposals.
- Ability to manage conflicting priorities meet tight deadlines and prioritise own work and support others.
- Excellent IT skills and ability to work independently using a range of applications, software and Microsoft office.

## **Attributes**

- A demonstrable commitment to equality, diversity and inclusion and able to apply this to different aspects of your work
- A commitment to the aims and values of Citizens Advice
- Self-starter who is time efficient, productive and prepared to work across a range of offices in the county.
- Flexible attitude to working hours and able to attend evening and weekend events/meetings.



## Our values

- **We're inventive** - We're not afraid of trying new things and learning by getting things wrong. We question every idea to make it better and we change when things aren't working.
- **We're generous** - We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.
- **We're responsible** - We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.



## 3 things you should know about us

1. PCA is a registered charity and is a member of the Citizens Advice service. PCA has two main advice centres in Wareham and Swanage, three outreaches in Upton, Bovington and Lytchett Matravers as well as several other locations in the community.
2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.
3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.



## How Citizens Advice works

The Citizens Advice service is a network of independent charities consisting of the National Citizens Advice and around 300 local Citizens Advice members, of which PCA is one.

PCA has:



- 23 local staff
- 40 volunteers

We deliver general advice through multiple channels on benefits, debt, housing, employment, energy, immigration, consumer issues and more.

We also run a number of projects including:

- Energy Advice projects
- Fuel Poverty Awareness projects
- Money Advice Services (MAS) Debt service
- Homelessness prevention projects
- Help to Claim- Universal Credit
- Welfare benefits and income maximisation projects
- Specialist employment project



## Find out more

Here are 2 ways you can find out more about us

<https://www.citizensadvice.org.uk/>

[www.purbeckadvice.org.uk](http://www.purbeckadvice.org.uk)



## The role

We're recruiting a highly motivated Business and Funding Development Manager to join our Senior Management Team. This is a new role.

Purbeck Citizens Advice is a member of Citizens Advice in Dorset (CAiD) a consortium of the four Dorset Council area LCAs: Bridport, Central, East Dorset and Purbeck Citizens Advice. This post will support the CAiD Managers in helping to drive the Services' income generation strategy. Helping us to grow and sustain our services to meet the needs of our clients.

The post holder will be initiating and leading on contact with potential donors, grant making bodies, statutory agencies and other relevant organisations both inside and outside Dorset to identify as wide and deep a range of potential income generation as possible. In addition, they will research and identify potential grant opportunities, matched against the CA service priorities. In this role the post holder will be responsible for using the existing research and development data held by the four LCAs, and establishing a new corporate database of potential funders and donors.

PCA offers free confidential advice online, over the phone and in person. We give people the knowledge and the confidence they need to find their way forward – whoever they are and whatever their problem.

In 2019-20 we helped over 2300 people face to face, over the phone, by email and webchat, as well as visiting our online advice pages. We help with everything from money issues to problems at work, housing to consumer rights.

You will have a commitment to the values and aims of our charity and want to play an integral part in developing a successful future and meet the changing needs of our clients. We want to deliver a high-quality dependable service, be someone our partners trust and know we provide value and impact.

We are committed to being a modern and flexible employer, our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (non-standard) working hours, working from home and job-sharing.

We particularly welcome applications from disabled and Black, Asian and Minority Ethnic (BAME) candidates as BAME and disabled people are currently under-represented throughout Citizens Advice. We also welcome applications from, LGB and Trans and non-binary candidates. We have made a positive commitment to employing disabled people and guarantee to interview all disabled candidates who meet the minimum essential criteria for the role as set out in role profiles.



<b>Closing Date:</b>	<b>9am Monday 19<sup>th</sup> October 2020</b>
<b>Interview Date:</b>	<b>W/C 19<sup>th</sup> October 202 via Zoom</b>

Please note, subject to the volume of applicants, applications may close early at the discretion of PCA.



## Terms and conditions

### 1. SALARY: As advertised

Appointment for this role will be paid at the advertised salary.

### 2. ANNUAL/TOTAL LEAVE

Annual leave days for this role are 28 days per annum plus bank holidays. We are also closed for a week at Christmas.

### 3. PENSION SCHEME

Citizens Advice provides a pension scheme through NEST. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

### 4. LEARNING AND DEVELOPMENT

PCA has a co-ordinated staff training and development strategy. This will mean that training for your current job, and future career developments relevant to PCA will be provided and you will be encouraged to take an active role.

### 5. DISCLOSURE AND BARRING SERVICE CHECKS (DBS)

Some Citizens Advice positions may require the successful candidate to undergo a DBS check.

### 6. EQUALITY AND DIVERSITY

PCA recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice will not

discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles.

Breaches of the policy may lead to disciplinary action.

## **7. DIGNITY AT WORK**

PCA is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

## **8. PROBATIONARY POLICY**

New appointments are subject to a three months probationary period.

Performance is reviewed after three months. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice's discretion, an extension of the probationary period by a further three months.

## **9. POLITICAL IMPARTIALITY**

An important part of the principle of impartiality is that PCA staff are seen to be upholding the principle of party political impartiality. To avoid possible misunderstanding or possible conflicts of interest guidelines have been established on staff taking part in party political activities. If you currently hold, or are intending to stand for local or national party-political office, we will expect you to tell us about this if shortlisted for interview.

## **10. LOCATION**

As advertised

## 11. EMPLOYMENT STATUS

As advertised

## 12. FLEXIBILITY

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (nonstandard) working hours, working from home and job-sharing.

## 13. HOURS OF WORK

As advertised.

Normal full-time working hours are 9 - 5, Monday to Friday, although these hours may vary from week to week to meet the needs of the job. Staff may be able to agree a different working pattern with their manager.



## What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at PCA means getting access to many benefits.

- A commitment to your development. We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.
- Everyone working at PCA has access to professional and completely confidential counselling and legal advisory services.
- Support when things in your life change. We'll be there for you with options for flexible working, career breaks, and support for parents and carers.



## Equality and diversity at PCA

Citizens Advice is fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

- We judge the application, not the person. The select panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.
- We offer a guaranteed interview scheme. If you have a disability and your application meets the minimum criteria for the post, we'll interview you for it.
- We're committed to changing attitudes towards disability, and making sure disabled people have the chance to fulfil their aspirations.
- We're part of Prejudice Free Dorset. This means we're committed to progress on age, disability, gender, race, religion and belief, sexual orientation and broader equality and human rights issues.

# Guidance for applicants

## Application form alternative formats

If you need this information or any of our job application forms in an alternative format, for example, large print, audiotape, Braille or Easy Read, please contact us on:

**01929 508225** or at **admin@purbeck.cabnet.org.uk** We are happy to receive applications in alternative formats.

## Important note

The electronic application form plays a key part in our recruitment and selection process. We use the information you provide to decide whether or not to invite you for an interview. It is important that you complete the application form as fully and accurately as possible, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying. Incomplete applications are unlikely to pass shortlisting. Please read this document for guidance on how to complete the form.

## Disability

We have made a positive commitment to employing disabled people and guarantee to interview all disabled candidates who meet the **minimum essential criteria** for the role as set out in the role profile and person specification.

You can also use this section to let us know if you require any adjustments to be made to the shortlisting process or to provide any information you wish us to consider when considering your application. If you are selected for interview, we will ask you to let us know if you have any access needs or may require reasonable adjustments to the interview or assessment (if applicable) at that stage. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

## Instructions on how to complete the Supporting information page: Information, experience, knowledge, skills and abilities section of the application form

This is a **key section** of the application form which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the

requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide one example for each requirement in the person specification (found in the job pack). You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 200 words.

A useful guide might be **S.T.A.R**:

- 🔍 **Specific** – give a specific example
- 🔍 **Task** – briefly describe the task/objective/problem
- 🔍 **Action** – tell us what you did
- 🔍 **Results** – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

## Entitlement to work in the UK

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that PCA does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

## Diversity monitoring

PCA values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this we need to know about the diversity profile of people who apply for posts at PCA. This information is given in confidence for monitoring purposes only and is not seen by anyone responsible for making recruitment decisions. However, if you would prefer not to answer any of the questions we ask, please pick 'prefer not to specify'

## GDPR: How we will use your information

The information you provide on this form will be used to help us decide whether to recruit you as a member of staff - this is our 'legitimate interest' under data protection law. It will only be seen by staff involved in the recruitment process, and will be stored securely.

If you are recruited we will retain your contact information in order to involve and support you. We will also collect additional information, such as next of kin details, and over time records of training, support meetings and where relevant, appraisals. Again, it will be kept securely, and only those people who need to see your information in order to involve you will have access to it.

All use of applicant's information will be relevant to their involvement, and may include:

- ☐ Contacting applicants when necessary
- ☐ Making reasonable adjustments to improve accessibility
- ☐ Monitoring statistical details of our applicants
- ☐ Providing ongoing support to applicants
- ☐ Addressing problems or complaints

You have legal rights over your data, including access to it, and the right to ask that it is corrected, restricted or deleted. There is more information on these rights on the Information Commissioner's Office website: [www.ico.org.uk](http://www.ico.org.uk)

If you have any questions about the use of your data, please contact the Admin Team by emailing: [admin@purbeck.cabnet.org.uk](mailto:admin@purbeck.cabnet.org.uk)

## Shortlisting outcomes

Shortlisted applicants will be invited for an interview. Some positions may require additional assessments (practical task/test or assessment centre). If this is the case, you will have received details either with the application pack or further details will be provided if you are shortlisted.

## References

All job offers are subject to the receipt of two satisfactory references: one of these should be your present or most recent employer, the other could be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the post applied for.

## Complaints procedure

Any applicant who considers that they have been unfairly treated or discriminated against should be advised to contact the Chief Officer, in writing, or by email, as soon as possible. Complaints received within one month will be taken seriously and investigated promptly and sensitively by the Chief Officer who will advise of the outcome. This does not affect your legal rights.

**Email:** [chiefofficer@purbeck.cabnet.org.uk](mailto:chiefofficer@purbeck.cabnet.org.uk)

**Address:**

Chief Officer  
Purbeck Citizens Advice  
Mill Lane  
Wareham  
Dorset  
BH20 4RA