
JOB DESCRIPTION

Job Title: Senior Adviser

Grade: E

Department: Impact Accelerator

Main purpose of job:

Part of senior team leading CAF's strategic consultancy work with charities, corporates, private clients and public sector. Implement and execute the advisory strategy in the wider of context of the Impact Accelerator, exploiting synergies with social investment and grant making, identifying innovation and growing impact through more strategic giving as well as driving advisory income.

Responsible to: Head of Impact and Advisory

Budgetary responsibilities: Responsible for budgeting multi-year programmes and projects (TBC)

Responsible for (staff/jobs): Responsible for line managing a small team of Advisers plus other advisers and freelancers on a project basis

Key Job Responsibilities:

Strategic Consultancy

- Responsible for leading high-quality strategic consultancy work with charities, corporates, private clients and public sector alongside other senior advisers.
- Lead day-to-day management of key client assignments including project and resource management and delivery of standout deliverables to clients.
- Present invaluable and practical strategic advice and insight to senior leadership in charities, corporates or public sector as well as (ultra) high net worth individuals.
- Work in close collaboration with grant making and social investment colleagues to deliver a fully bespoke, impactful offering to clients.

Strategy and Leadership

- Lead and mentor team of advisers, providing guidance and training, supported by robust performance management and personal development opportunities in line with strategy.
- Implement and refine where necessary advisory strategy in conjunction with other senior advisers and Head of Impact and Advisory.
- Ensure alignment with CAF's theory of change and delivery against identified outputs and outcomes.
- Work with Growth and Performance Lead on operational and process needs relating to advisory and the Impact Accelerator more generally.
- Contribute to strategic Impact Accelerator initiatives where necessary.

Business Development and Client Development

- Responsible for driving growth and innovation in CAF's advisory offering, ensuring it remains relevant in an ever-changing world and aligned with client needs.
- Identify key opportunities to grow fee income, lead proposals/pitches and contribute proportionally to team fee income targets.

- Work closely with business development function and cultivate relationships with other key referral partners within CAF and externally.
- Lead retention and growth of CAF clients through effective client management - focus on multi-year, multi service contracts that combine advisory, grant making and social investment expertise.

Thought leadership and training

- Mentor and upskill other members of the Impact Accelerator team as well as other colleagues where relevant, sharing expertise and skills both informally and formally.
- Promote CAF externally as a thought leader and a partner of choice for donors and charities alike.
- Represent CAF at events, share best practice, produce thought leading articles and maintain relevant sector network.
- Work with colleagues in the UK and across the CAF global network to maximise opportunities and to share learning and best practice.

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Date: February 2024

PERSON SPECIFICATION

Job title: Senior Adviser

Date: February 2024

Attributes	Essential ✓	Desirable ✓	How Evidenced...
Experience			A/C
<ul style="list-style-type: none"> • Experience of leadership role/ line management 	✓		
<ul style="list-style-type: none"> • Experience of developing and nurturing talent 	✓		
<ul style="list-style-type: none"> • Proven track record in delivering significant business growth in a consulting environment. 	✓		
<ul style="list-style-type: none"> • Experience advising foundations, individual philanthropists, charities, corporates or the public sector 	✓		
<ul style="list-style-type: none"> • Strategic experience of designing and managing grant-making programmes and foundations 		✓	
<ul style="list-style-type: none"> • Experience managing client relationships 	✓		
<ul style="list-style-type: none"> • Experience of advising clients on at least one area: philanthropy, grant making, social investment, sustainability, fundraising, strategy, governance, impact measurement, theory of change, programmatic design and/or practice. 	✓		
<ul style="list-style-type: none"> • Proven experience of budgeting, reporting and analysis 	✓		
<ul style="list-style-type: none"> • Project management experience 	✓		
<ul style="list-style-type: none"> • Experience in analysing complex systems and producing workable strategies and proposals, presentations, research, etc. 	✓		
Qualifications			E
<ul style="list-style-type: none"> • Degree standard or relevant sector qualification and/or equivalent experience 	✓		
Specialist Skills/ Ability/Knowledge			A/C/T
<ul style="list-style-type: none"> • Strong analytical and problem-solving skills 	✓		
<ul style="list-style-type: none"> • Ability to identify opportunities and innovation 	✓		
<ul style="list-style-type: none"> • Decision-making skills in complex and pressured environments 	✓		
<ul style="list-style-type: none"> • Strategic vision: ability to formulate and lead on strategies and plans 	✓		
<ul style="list-style-type: none"> • Knowledge of latest best practice in philanthropy, sustainability, fundraising, governance, strategy, impact measurement, grant-making, social investment 	✓		
<ul style="list-style-type: none"> • Ability to work in cross-functional teams to deliver business results 	✓		
<ul style="list-style-type: none"> • Willingness to delve into cause areas to learn and upskill as needed based on opportunities and client demands 	✓		

• Ability to influence and negotiate with demanding clients	✓		
• Ability to drive business development	✓		
• Ability to share learning and upskill others	✓		
• Ability to facilitate and drive workshops and discussions with very clear outputs and outcomes	✓		
Communication			
• Excellent communication skills, confident presenter, persuasive speaker and comfortable in engaging people of all levels.	✓		A/C/T
• Comfortable presenting at board level of charities, companies, trusts and foundations, as well as working with UHNWI and HNWI	✓		
• Strong interpersonal skills	✓		
Personal Qualities			
• Leadership qualities	✓		A/C
• Passionate, results driven with a can-do attitude.	✓		
• Ability to prioritise own work according to wider CAF objectives	✓		
• Self-motivated, energetic and enthusiastic	✓		
• Keen eye for detail	✓		
• Ability to handle several projects at any one time.	✓		
Prior to Appointment			
<u>All posts:</u>			
Credit Check	✓		R/E
Dow Jones Check	✓		
Basic DBS Check	✓		
Employment References	✓		
Medical Clearance	✓		
Right to Work in the UK	✓		
<u>FCA Approved Posts:</u>			
Standard DBS Check	✓		

✓ Tick either the Essential or Desirable column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

Key

R = References, **E** = Evidence/Certificates, **A** = Application, **C** = Competency Interview, **T** = Testing/Assessment