
JOB DESCRIPTION

Job Title:	Adviser
Grade:	D
Department:	Advisory, Impact Accelerator

Main purpose of job:

Deliver and develop high-value consultancy work with CAF's private clients, corporate, public sector and charity clients. Play a role in further building CAF's Advisory proposition within CAF's wider Impact Accelerator offering which brings together expertise in advisory, grantmaking and social investment.

Responsible to: Senior Adviser

Budgetary responsibilities: Contribute to budgeting for multi-year programmes and projects.

Responsible for: N/A

Key Job Responsibilities:

Strategic client consultancy

- Responsible for delivering CAF's strategic consultancy work with private clients, corporates, the public sector and charities and provide support to senior advisers as and when needed.
- Work confidently with a range of philanthropists, corporate clients and charity leaders at all levels of seniority delivering concrete advice to assist in the development of their impact/giving strategies and implementation, impact frameworks and evaluation, fundraising strategies, governance, etc.
- Responsible for day-to-day project management and excellent client service.
- Responsible for delivery of high-quality written assignments to clients.
- Work closely with colleagues in the Impact Accelerator to ensure development and delivery of comprehensive client offering as well as identifying opportunities and synergies with other teams.

Client management, business development

- Proactive approach to managing consultancy pipeline and contribute to shaping and implementing the Advisory team's strategy in the context of the broader Impact Accelerator.
- Responsible for production of quality proposals in response to business leads.

- Contribute to the retention and growth of CAF's advisory clients. Expand existing clients through effective client management - focus on multi-year, multi service contracts that combine advisory, grantmaking and social investment expertise.

Thought leadership and learning

- Act as a key source of expertise for colleagues in the Private Client and Corporate Client teams.
- Work with colleagues in the UK and across the CAF global network to maximise opportunities and to share learnings and best practice.
- Promote CAF externally as a thought leader so that CAF is seen as a partner of choice.
- Represent CAF at events where necessary, input into external affairs campaigns or thought leadership materials, network externally to promote CAF as the adviser of choice for private clients, corporates and charities looking for consultancy services and promote the opportunity of an end-to-end service through the Impact Accelerator.

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: June 2024

PERSON SPECIFICATION

Job title: Adviser

Attributes	Essential	Desirable	How Evidenced...
	✓	✓	+
Experience			A/C
Proven track record in delivering significant business growth in a consulting environment.		✓	
Experience advising foundations, individual philanthropists, charities, corporates or the public sector	✓		
Strategic experience of designing and managing grant-making programmes and foundations		✓	
Experience managing client relationships	✓		
Experience of advising clients on at least one area: philanthropy, grantmaking, social investment, sustainability, fundraising, strategy, governance, impact measurement, theory of change, programmatic design and/or practice.	✓		
Proven experience of budgeting, reporting and analysis		✓	
Project management experience	✓		
Experience in analysing complex systems and producing workable strategies and proposals, presentations, research, etc.	✓		
Experience in international development, working in the Global South		✓	
Qualifications			E
Degree standard or relevant sector qualification and/or equivalent experience	✓		
Specialist Skills/ Ability/Knowledge			A/C/T
Foreign language skills		✓	
Strong analytical and problem solving skills	✓		
Ability to identify opportunities and innovation	✓		
Decision-making skills in complex and pressured environments	✓		
Strategic vision: ability to formulate and lead on strategies and plans	✓		
Knowledge of latest best practice in: philanthropy, sustainability, fundraising, governance, strategy, impact measurement, grant-making, social investment	✓		
Ability to work in cross-functional teams to deliver business results	✓		
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 facilitate and drive workshops and discussions with very clear outputs and outcomes		✓	
Communication			A/C/T
Excellent communication skills, confident presenter, persuasive speaker and comfortable in engaging people of all levels.	✓		
Comfortable presenting at senior level of charities, companies, trusts and foundations, as well as working with UHNWI and HNWI	✓		
Strong interpersonal skills	✓		
Personal 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			R/E
<u>All posts:</u>			
Credit Check	✓		
Dow Jones Check	✓		
Basic DBS Check	✓		
Employment References	✓		
Medical Clearance	✓		
Right to Work in the UK	✓		
<u>FCA Approved Posts:</u>			
Standard DBS Check	✓		
FINAL SCORING			
✓ 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			