



advice and support for older age

**Independent
Age**

JOB DESCRIPTION

Job Title:	Trust and Foundations Manager
Division:	Fundraising
Department:	Partnerships and Philanthropic Giving
Salary Band:	£38,000 - £42,000 (depending on experience)
Reporting to:	Senior Trusts and Foundations Manager
Direct Reports:	none
Location:	Head Office: 18 Avonmore Road, London, W14 8RR

Job Purpose

To be responsible for managing the operational delivery and supporting the development of the Trust and Foundations Strategy. The Trust and Foundations Manager will increase income from new and existing Trusts and Foundations whilst also working in support of the Senior Trusts and Foundations Manager.

The Trusts and Foundations Manager will work closely with the Senior Trusts and Foundations Manager, the Head of Partnerships & Philanthropic Giving and the wider Partnerships and Philanthropic Giving team to deliver a new fundraising programme that encompasses charitable Trusts and Foundations and strategic and statutory grants up to the value of £25,000 per funder. They will build, develop and maintain relationships with Trusts and Foundations, focusing on securing strategic, multi-year grants and donations.

Development & Income Growth:

- With the Senior Trust and Foundations Manager, manage the operational delivery of a detailed plan of action to deliver agreed milestones to establish and grow income through the Trusts and Foundations programme.
- With the Senior Trusts and Foundations Manager, contribute to the development of the strategic framework - strategy, plans, budgets, KPIs – and deliver the key operational building blocks, processes, systems and protocols for the Trusts and Foundations team, ensuring best practice as well as legal compliance.
- To personally lead on developing excellent, productive, long term relationships with funders ensuring all research, development planning, cultivation, solicitation, thanking and stewardship is undertaken to the highest possible standard across the team.
- To contribute to the development and implementation of a new business pipeline for trusts, foundations and grants, with the aim of developing long-term strategic relationships with funders up to £25,000 per annum per funder.
- To work closely with colleagues in Services, Policy and other operational teams to develop a clear and compelling case for support and a pipeline of fundable work, ensuring all details, including budgets, timescales, and all other numbers, are accurate.

- Proactively identify, prioritise and appropriately respond to funding opportunities as they arise, ensuring that applications are targeted, timely and compelling, and that any existing relationships are maximised in support of our applications.
- To ensure that all information and data on funders is recorded in an accurate, timely, and compliant fashion.
- To work with the Senior Trusts and Foundations Manager and other appropriate colleagues to explore and deliver on opportunities to invite funders to cultivation events.

Integrated Engagement & Relationship Fundraising:

- To deliver a programme of prospecting, cultivation, solicitation and stewardship activities with new and existing charitable Trusts and Foundations, and grant-makers, ensuring best practice in relationship fundraising.
- To maintain and develop relationships with a portfolio of funders and prospects and, in liaison with the Senior Trusts and Foundations Manager, to ensure that all donors and prospects have an appropriate account manager responsible and accountable for cultivating, soliciting, negotiating, thanking and stewarding new and existing supporters in their caseload.
- To contribute to the development of clear and compelling cases for support for philanthropic/grant donors, including building excellent internal relationships with colleagues in the Services, Engagement and Resources Divisions to package proposals and deliver grant/gift T&Cs, ensuring all information is accurate.
- To capitalise on internal/existing Independent Age national and regional networks to develop new and existing strategic donor relationships including via Trustees, volunteers, service users, donors, events participants and campaigners.
- To raise the profile of the Trusts and Foundations programme internally (i.e. within Independent Age) and develop strong, cooperative working relationships with colleagues, in order to encourage a holistic view of all external contacts and identify new funder prospects and cultivation opportunities
- To develop and maintain an in-depth knowledge of Independent Age's work, in order to present current and prospective funders and donors with an appropriate, articulate and compelling case for support – both in person and in writing

Other Duties

- To ensure that all fundraising activities adhere to charity law, compliance and fundraising best practice, including in the areas of ethical due diligence, data protection, privacy and marketing consent, and vulnerability.
- To act as a point of contact for internal and external stakeholders on matters relating to Trusts and Foundations at Independent Age.
- To observe and comply with all Independent Age Policies, including the key policies and procedures on Confidentiality, Data Protection, Health and Safety, Safeguarding and Information Technology.
- To undertake other reasonable duties as directed by the Head of Partnerships & Philanthropic Giving and/or Assistant Director of Fundraising as the team's, department's and division's work develops and new needs emerge.
- This role may require occasional travel and overnight stays.

PERSON SPECIFICATION

EDUCATION & QUALIFICATIONS

Essential

- Educated to degree level, or to have equivalent experience

Desirable

- Evidence of delivering philanthropic giving income growth

EXPERIENCE & KNOWLEDGE

Essential:

- Evidence of working at manager level to contribute to the development and implementation of successful Trusts and Foundations strategies, particularly new business as well as uplift from existing supporters, resulting in growth in income from charitable funders.
- A track record of achieving support from Trusts and Foundations and successfully building long-term relationships with funders.
- Experience of gathering, analysing and interpreting often complex information to write high-quality, tailored proposals/reports for funders.
- Knowledge of best practice in the prospecting, cultivation, solicitation, thanking, and stewardship of new and existing trusts and foundations.
- Contributing to the development of clear and measurable grant/gift agreements in liaison with key stakeholders and in compliance with internal and external guidelines and best practice.
- Working with senior colleagues, volunteers and Trustees to support Trusts and Foundations fundraising, e.g. through making introductions, peer-to-peer asks etc.
- Knowledge of current charity law, compliance and fundraising best practice as they apply to fundraising from charitable trusts, grants and major donors, particularly in the areas of ethical due diligence, data protection, privacy and marketing consent, and vulnerability.

Desirable:

- Evidence of working on successful cultivation events for high-value funders

SKILLS & ATTRIBUTES

Essential

- Proven people management experience and expertise
- Excellent interpersonal, networking and relationship building skills, including ability to represent the charity to senior-level supporters and internal/external stakeholders
- The ability to be flexible, diplomatic and assertive
- Drive, energy and resilience
- Ability to solve problems and identify opportunities, make decisions and prioritise effectively as a manager
- Excellent verbal and written communication skills, including strong numeracy
- Excellent time management and ability under pressure to prioritise, deliver, manage and coordinate a number of projects and activities simultaneously to tight timescales

- Understanding of the legal and regulatory responsibilities of a fundraising charity and of current fundraising, marketing and branding challenges and trends

Desirable

- Strong affinity with our cause and knowledge of older people's issues.

Terms and conditions of employment

Job descriptions cannot be exhaustive and so the post-holder may be required to undertake other duties which are broadly in line with the above key responsibilities.

Independent Age is committed to equality of opportunity and of eliminating discrimination. All employees are expected to adhere to the principles set out in its Equal Opportunities Policy and all other relevant guidance/practice frameworks.

Tenure: Permanent role

Hours of work: Full time (35 hours per week)

Holidays: 28 days per annum, pro rata for part-time staff. This includes three days to be taken over Christmas when the office is closed for a week

Bank holidays: Eight bank holidays per annum, pro rata for part-time staff

Pension: Independent Age operates a pension scheme which employees are eligible to join.

Life assurance: Members of the pension scheme are eligible to receive five times their annual salary for death in service

Season ticket loans: An interest-free season ticket loan is available to all staff on completion of their probation period