

JOB DESCRIPTION

JOB TITLE:	Trusts Manager
BAND:	6
SALARY:	£35,392 to 42,618
HOURS:	37.5 Hours with some out-of-hours working
PLACE OF WORK:	Flexible/ Agile working with 50% time-based in the office
TYPE OF CONTRACT:	Permanent
DEPARTMENT:	RUHX – Charity Team
SPECIALITY / DIVISION:	Strategy Directorate
RESPONSIBLE TO:	Head of Development

RUHX is the working name of RUH Charitable Fund, the official NHS charity of The Royal United Hospitals Bath NHS Foundation Trust (RUH). In 2022, we changed our working name from “The Forever Friends Appeal” to RUHX to better reflect the extra-extraordinary work we fund and capture the exceptional commitment and generosity of our supporters who give us the power to do more.

At RUHX, we are more than a hospital charity. Since 1999, we have gone further to give every patient the extra extraordinary care they deserve while supporting our staff to do what they do best and furthering innovation within our hospitals. We are out there in our community, collaborating with the people and organisations that drive real change. And we’re making sure that every penny we raise goes towards improving health, happiness, and well-being for everyone in our community.

Our charity values are important to us. They ensure that we are all working towards the same goals, shape our inclusive and diverse team culture, and are in the DNA of all we do.

- **Creating comm-unity** - We bring people together, build trust, and inspire others with empathy and compassion. We believe everyone matters, and we are more together.
- **Positively disruptive** - We are brave, bold and ready to shake things up if it helps us make our place healthier and happier for everyone.

- **Science with heart**—We make real people the center of everything we do and emphasize the human element in every story.
- **Exchange (Giving and taking)** – We invite others to join the conversation, share their own stories and give back as much as we welcome in.

## Development background

We are committed to securing philanthropic and charitable income to support staff and patient services at the RUH. The five key areas we support are medical equipment, patient and staff support, medical research, capital campaigns, and 'where the need is greatest'. Our successful fundraising efforts are built on lasting relationships with philanthropists, corporate organisations, trusts and foundations, the local community, charity events, and individual supporters.

Our track record speaks for itself. We have effectively executed charitable projects and secured significant historical fundraising income, including a £10 million contribution to the £50 million Dyson Cancer Centre, set to open in Spring 2024. Other successful projects include the Dyson Centre for Neonatal Care, the RNHRD and Brownsword Therapies Centre, the Robotic Surgery campaign, Cardiovascular Research, and the Breast Unit redevelopment, among many others. As we plan our next major campaign, the post holder will be crucial in securing philanthropic gifts as part of the Development team and contributing to the campaign's successful delivery.

## Why the City of Bath?

Our offices are centrally located within the hospital site in the World Heritage City of Bath—a place rich in history and surrounded by stunning scenery. Nestled in the Somerset countryside, Bath is home to iconic landmarks such as the Roman Baths, The Royal Crescent, and The Circus. Beyond its historical significance, Bath serves as a dynamic hub for business and innovation, attracting some of the world's most renowned and wealthy entrepreneurs, philanthropists, and business owners.

With a thriving business community, outstanding educational institutions, beautiful surroundings, and a growing tech sector, Bath offers ample opportunities to develop networks and enhance RUH's charitable income. In addition to developing nationwide prospects, the city offers direct transport links to major cities such as London, Bristol, the rest of the UK and Europe- perfect for donor meetings and flexible working.

## JOB SUMMARY: Philanthropy Manager

The Trusts Manager will be a driven individual with a background in securing five-, six-, and seven-figure gifts from charitable funders, corporate organisations, and/or Major Donors. Your primary responsibility will be to manage a diverse pool of Trusts and Foundations, both existing and prospective, to maximise philanthropic support across the RUH.

In this role, you will be pivotal in our Development Team, directly reporting to the Head of Development. Here, you will have the opportunity to collaborate with some of the UK's most prominent Trusts and Foundations. Your objective will be to achieve targets by proactively identifying and cultivating relationships with Trusts and Foundations and writing compelling grant applications for our key projects (medical research, patient and staff support, capital campaigns, medical equipment, and 'the area of greatest need.')

The ideal candidate will be adept at nurturing lasting relationships with funders, working towards a team income target of over £1.5m. You will also be a confident stakeholder manager, working closely with clinicians, researchers, and senior leaders to identify some of the key RUH funding areas that can deliver impact.

Central to your success will be your ability to articulate compelling cases for support verbally and in writing, translating complex information into persuasive appeals and grant applications. You will have a proven track record of demonstrating initiative in seizing fundraising opportunities and championing the endeavours of Trusts and Foundations. Your role will secure significant contributions for transformative projects and cultivate a culture of donor-centric giving, fostering long-term partnerships.

Above all, you will be dedicated to RUHX, the RUH, and the NHS—committed to transforming patient care through a business-minded and innovative approach to driving development.

#### KEY RESPONSIBILITIES:

- **Development-** The post holder will manage Trust and Foundation income and secure an annual income of £500k+ towards the total Development team target of £1.5m. The Trusts Manager will manage a portfolio of major gifts prospects and will be responsible for the cultivation and stewardship of, five, six and seven figures gifts.
- **Management—Responsible for managing an established prospect pool and identifying new donors while effectively reporting against income projections.** Demonstrate potential for line management capabilities, with the opportunity for supervisory responsibilities as the role grows.
- **Governance and Compliance-** ensuring philanthropic giving complies with all fundraising regulatory and legal obligations, including GDPR, The Fundraising Regulator and the Code of Fundraising Practice.
- **Financial & Risk Management—Working with the Head of Development, the post holder is responsible for managing Trust and Foundation income and expenditures** to meet an individual target.
- **External Relations and Communications-** working with the Head of Development and the Marketing & Communications Team, supporting corporate communications, public relations, and brand consistency in relation to Trust and Foundation giving.

#### MAIN DUTIES & RESPONSIBILITIES:

##### Development

- Manage a prospect pool of new and established relationships with Trusts and Foundations, aiming to secure significant contributions towards a team income of £1.5m.
- Responsible for identifying and securing five, six and seven-figure gifts, developing a sustainable pipeline of prospects and income.
- Deliver donor-centric cultivation and stewardship plans to grow Trusts and Foundation income incrementally.
- Conduct prospect research and collaborate with the RUHX team to identify potential Trusts and Foundations.
- Provide sound relationship skills with an ability to understand and explore donors' interests and align these with key fundraising projects.

- Responsible for networking and connecting with Trust grants officers and trustees, HNWI's, influencers, senior stakeholders, and senior volunteers, in collaboration with the Development Team to lift RUHX's profile.
- Support the management of a Development Advisory Board of influential philanthropists and senior volunteers alongside the Head of Development to steer RUHX's fundraising efforts.
- Ability to work outside of core hours and at weekends when required.

### **Management**

- Provide fundraising CRM reports aligned with agreed Key Performance Indicators (KPIs) for the Head of Development as required.
- Cascade project information and workload capacity effectively to the RUHX team.
- Responsible for maintaining and re-enforcing accurate and dynamic CRM records, inclusive of all donor records, opportunities, stakeholder relationships, team reporting, management information and campaign data.
- Responsible for driving professional development by identifying the best national and international third-sector and corporate training programmes.
- Demonstrate the potential and willingness to further line management skills, with the possibility of assuming supervisory responsibilities as the role and RUHX evolve.

### **Strategy**

- Collaborate with the Head of Development and senior stakeholders to identify new projects and craft compelling proposals verbally and in writing.
- Foster clear communication and alignment of RUHX's vision, values, and behaviours among staff, volunteers, and stakeholders, fostering a culture of support, diversity, access, and inclusion.
- Support the Head of Development in identifying and integrating innovative approaches and technologies, such as Artificial Intelligence and CRM management, into daily fundraising practices.

### **Governance & compliance**

- Working with the Head of Development, responsible for ensuring all Trust and Foundation gifts are accepted in compliance with the Charity Commission's regulations and spent in accordance with associated Gift Agreements and best practices.
- Responsible for adhering to fundraising regulations and charity legislation with a sound knowledge of GDPR.
- Handle highly confidential and sensitive information about donors, patients, families, and RUH staff.
- Ensure strict adherence to all charity policies and procedures.

### **Financial planning**

- Manage and deliver against an individual annual budget and deliver income projections.
- Coordinate with the Finance Team to ensure proper authorisation and recording of all philanthropic gifts.

### **External relations and communications**

- Collaborate with the Marketing & Communications team and the Impact Manager to effectively report and promote Trust and Foundation activities.
- Responsible for being aware and responsive to the Third Sector and NHS environment in which RUHX operates.

## **POLICIES AND EXPECTED STANDARDS**

The post holder must familiarise themselves with all Trust policies and procedures and comply with them at all times. The Code of Expectations of Employees in particular set out what you as a post holder are required to follow at all times and you should study this carefully. Failure to comply with any of the Trust's policies may result in disciplinary action up to and including dismissal.

All staff must have an understanding of their responsibilities in relation to being accountable for knowing who is in and has access to their area of work. Staff must recognise the need to challenge appropriately and understand their duty of care relevant to their position within the organisation. Staff must be familiar with and understand the correct reporting process where there has been a potential breach.

## **OUR VALUES & BEHAVIOURS**

All staff are required to adopt and follow the Trust values and behaviours at all times. Our values and behaviours are:



New staff will be presented with a leaflet outlining the values and behaviours expected of them at trust induction.

## **CONFIDENTIALITY & INFORMATION GOVERNANCE**

All post holders must comply with all relevant legislation & Trust Policy with regards to Confidentiality & Information Governance, including the Data Protection Act (2018) ensuring that no information obtained through work is communicated to any persons other than those requiring it to complete their duties.

## **SAFEGUARDING ADULTS & CHILDREN**

All Trust staff have a responsibility to safeguard adults & children which includes an understanding of the relevant Trust & Local Safeguarding Adults & Children's Board Policies.

## **HEALTH AND SAFETY**

Employees must act at all times in line with relevant Trust Policies & the Health and Safety at Work Act (1974) to ensure a safe environment for patients, visitors and staff.

## **HEALTHCARE ASSOCIATED INFECTIONS (HCAIs)**

All Employees are responsible for ensuring that:

- your practice so far as is reasonably practicable, protects patients, staff and other persons against risks of acquiring HCAIs;

- where patients present with an infection or acquire an infection during treatment, that they are identified promptly and managed according to good clinical practice to treat the infection and reduce the risk of transmission.
- you follow all Trust policies, procedures and processes to meet the duties set out in the NHS Hygiene Code and assist in their full compliance by all staff within your department.

## **HEALTH & WELLBEING**

The Royal United Hospital is committed to promoting the Health & Wellbeing of its staff. The Trust is a smoke free site; smoking is not permitted anywhere in the grounds. The Trust has a Stress Management Policy, which staff should familiarise themselves with to ensure that they have adequate support for the management of their own, and their colleagues stress. The Trust has an onsite Employee Assistance Programme (EAP) which is available to all staff, offering support to staff & their families.

## **EQUALITY & DIVERSITY**

The Trust values Diversity and actively works towards promoting Equality both in terms of its healthcare provision and within its current and potential workforce.

## **PATIENT AND CARER EXPERIENCE**

The Trust continuously aims to improve the experience of patients and carers using the RUH. All staff are expected to follow the guidance contained in the Patient Experience Strategy for the RUH;

The 3 main points to remember are:

- 1) Communicate clearly with people;
- 2) Involve patients and carers in their care and with the hospital;
- 3) Seek out and use patient and carer feedback in all services.

Also refer to the Carer Policy, Respect behaviours and references to improving experience contained in policy and guidance; all staff will be aware of Equality and Diversity and will assist with accommodating people with special needs. Your individual behaviour can make a significant difference to patient and carer experience.

## **FLEXIBILITY**

This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their designated manager. In addition they may be required by their manager to carry out any other duty commensurate with their banding and expertise.

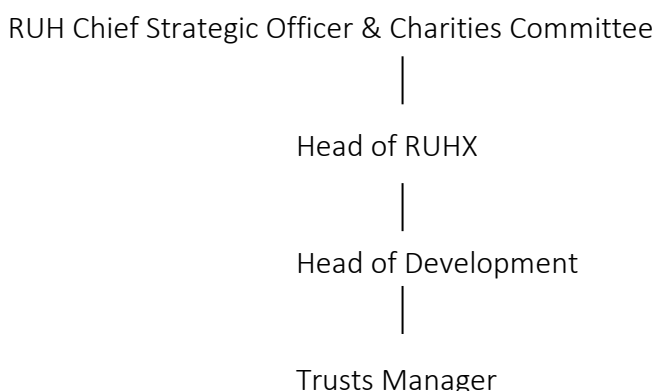
## **DIMENSIONS**

Within a team of 16, the role works closely with all staff to manage and grow Trusts and Foundation income.

The post holder will be responsible for securing an annual income of £xxx and managing a budget of £500k and reporting to the Head of RUHX. The Trusts Manager is accountable to the Head of Development and the RUHX Director and is responsible for working with the Head of Development to deliver regular reports on RUHX’s philanthropic income position.

The Trusts Manager will work as part of the Development Team to secure income towards the RUH’s key fundraising projects, capital campaigns and ‘areas of greatest need’. Working collaboratively to agree clear and accurate income/expenditure forecasts, timetables and stakeholder commitments which ensure that fundraising can progress with confidence.

### STRUCTURE CHART



### ANNUAL LEAVE ENTITLEMENTS:

Length of Service	Annual leave and public holidays
On appointment	202.5 hours plus 60 hours (27 days + 8 days) pro rata for part time staff
After five years’ service	217.5 hours plus 60 hours (29 days + 8 days) pro rata for part time staff
After 10 years’ service	247.5 hours plus 60 hours (33 days + 8 days) pro rata for part time staff

### NOTICE PERIODS:

Band	Notice Period
Band 1 – 3	4 weeks
Band 4	6 weeks
Band 5 – 6	8 weeks
Band 7 – 9	12 weeks

### PERSON SPECIFICATION

CRITERIA REQUIRED	ESSENTIAL	DESIRABLE
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<b>Qualifications &amp; Training</b>	<p>Educated to degree / diploma level or equivalent experience.</p> <p>Evidence of continuous professional development</p>	<p>Business / charity marketing, or fundraising qualification</p> <p>Member of Institute of Fundraising or equivalent professional body.</p>
<b>Knowledge &amp; Experience</b>	<p>Sound understanding of current charity law relating to Trusts and Foundations, tax, trust &amp; foundations etc.</p> <p>Ability to interpret and implement with minimal guidance, national standards and Institute of Fundraising Codes of Practice relating to donor engagement and involvement.</p> <p>Significant experience in 'Trusts and Foundations' fundraising theory and strategies that have encompassed the use of prospect pools / research / gift tables / gift assessment / donor motivation / solicitation techniques / including engagement events etc, and writing compelling grant applications which result in securing income targets.</p> <p>Significant experience in an account management role dealing with complex, sensitive relationships aimed at securing co-operation, agreement and income</p> <p>Experience of developing excellent working relationships with senior level professionals</p>	<p>Knowledge of healthcare provision in the NHS and current priorities.</p> <p>Knowledge of the local community including excellent networks</p> <p>Knowledge of RUHX and its aims</p> <p>Knowledge and experience in line managing a team and volunteers.</p>
<b>Values</b>	<p>Values and respects others, treats everyone as an individual, is non-judgemental</p> <p>Motivated to be genuinely kind and caring</p> <p>Helps and co-operates with colleagues</p> <p>Pro-active and takes responsibility</p> <p>Willing to learn, open to change</p> <p>Motivated to make a difference in whatever way they can</p> <p>Takes pride in themselves, their appearance, their role and where they work.</p>	
<b>Specific Skills</b>	<p>Ability to lead, monitor and evaluate the effectiveness of policies and strategies within areas of responsibility</p> <p>Sound analysis / interpretation of Trust &amp; Foundations motivations &amp; requirements, and devising / amending appropriate strategies for each</p> <p>Ability to develop comprehensive action and project plans for areas of responsibility</p> <p>Ability to analyse a wide range of information and statistics relating to donors to:</p>	

	<ul style="list-style-type: none"> <li>• Support the Head of RUHX in providing reports</li> <li>• Produce comprehensive and informative research on prospective funders</li> <li>• Provide presentations in a format that can be understood by a variety of audiences</li> </ul> <p>Excellent communication, presentation, negotiation and interpersonal skills at a senior level including:</p> <ul style="list-style-type: none"> <li>• Speaking at formal events on behalf of the Appeal</li> <li>• Communicating with donors and other stakeholders at all levels</li> <li>• Leading on the writing and presentation of compelling bids, reports / papers / proposals aimed at soliciting support</li> <li>• Leading on the design and production of high quality communication material, ensuring it meets the needs of the target audience.</li> </ul> <p>Ability to plan complex cultivation and stewardships events, campaigns and media work, with an aptitude for organisational detail</p> <p>Confidence to find &amp; articulate mutually beneficial opportunities for the charity &amp; prospective donors</p> <p>Ability to use IT systems including Microsoft Office software, plus knowledge of RaisersEdge NXT relationship management database to produce reports, publications &amp; proposals</p> <p>Ability to budget and control the use of financial and other resources</p> <p>Ability / confidence to work under own initiative / motivation and able to time-manage and prioritise workloads in busy and demanding circumstances with tight timescales;</p> <p>Team working / Excellent team player</p>	
<p><b>Physical Skills &amp; Effort</b> <b>Emotional Effort</b></p>	<p>Enthusiasm for meeting new people &amp; developing strong working relationships</p> <p>Ability to act as the sole representative of the Appeal &amp; RUH in a range of fundraising settings</p> <p>Able to demonstrate commitment and enthusiasm for fundraising work and RUHX – being proactive, making improvements and bringing new ideas and developments to the table</p>	

	<p>Ability to maintain confidentiality with patients / supporters in what can occasionally be distressing or emotional circumstances</p> <p>Stamina and resilience, plus capable of concentrated work under pressure despite frequent interruptions</p> <p>Ability to perform manual handling duties, eg. setting up fundraising events and equipment as necessary</p> <p>Good standard of personal presentation</p>	
<p><b>Requirements due to Working Environment</b></p>	<p>Daily and more or less continuous VDU working with advanced keyboard use</p> <p>Ability to work out of hours on a regular bases, with time off in lieu where appropriate</p> <p>Car driver and prepared to travel around the RUH catchment area</p>	