



Because no one
should face death
or grief alone

Job Description

System Title: (Office use only)	Trust Fundraiser and Case for Support Officer
Operational Job Title:	Trust Fundraiser and Case for Support Officer
Grade / Job Family:	E
Department:	Fundraising
Effective Date:	April 2024
Peoplehub Role ID:	

• 1. Main Purpose of Job

This role will work within the Trusts and Case for Support teams to secure income from medium-sized grant-giving charitable trusts and foundations (gifts in the region of £10-30k) for Sue Ryder, in line with its strategic plan and business priorities. They will also support the Case for Support function, collecting and researching the information needed to support applications and reports for funders.

- To apply to trusts and other grant givers with the propensity to give gifts in the region of £10-30k.
- To provide first class stewardship to donors, seeking to retain them as well as uplift their donations, wherever possible.
- To research new trust supporters.
- To maintain accurate, up to date and comprehensive records of trusts on the fundraising database or CRM system (currently Raiser's Edge).
- To promote best practice in trust fundraising in line with the charity's commitments to regulatory bodies.
- To support service information requests from fundraising teams and translate them into project briefs and compelling case for support materials.
- To liaise with colleagues across the organisation to collate information that enables the fundraising team to report back to funders with high quality reports on how the funder's support has been used.
- To assist with the tracking and administration of restricted funding.



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2. Position in Organisation

- Reports to the Senior Trust Fundraising Manager.
- Works closely with the Senior Case for Support Officer and Senior Trust Fundraiser.
- Key internal contacts include other members of the High Value Team, Supporter Experience, Data and Insight Team, the wider Fundraising team including regional fundraising colleagues and other directorates such as Healthcare (including Service and Operational Directors), Finance and Legal.
- External contacts include trust supporters, volunteers and third parties.

3. Educational Standard/Level

2 years relevant work experience

4. Knowledge & Proven Ability

- Experience of securing gifts of over £10k from trusts (classed as medium sized donors).
- Experience of maintaining relationships with funders and providing tailored donor care and stewardship plans.
- Experience of cultivating prospects, initiating conversations and planning service visits for donors.
- Experience of project-based fundraising and the development of restricted and unrestricted propositions within a fundraising team
- Ability to organise and prioritise own workload and work to targets and deadlines.
- IT literate, including the ability to use Microsoft packages and fundraising databases (currently Raiser's Edge).
- Ability to accurately and routinely update and maintain databases and electronic systems.
- Experience of developing pipelines of trust income and activity.
- Experience of working with Senior Managers/Directors (internally and externally) as well as representatives of external grant giving bodies.
- Ability to translate complex information into accessible and accurate proposals/briefs understandable by non-experts.
- Ability to follow appropriate standards and Sue Ryder processes, including data protection guidance, to comply with regulatory bodies.



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5. Skills

- Excellent attention to detail
- Numerate and able to interpret data and budgetary information
- Excellent communication skills, both written and verbal, with the ability to interact with internal and external stakeholders at all levels
- Ability to creatively and appropriately bring to life the charity's vision, goals and key messages in communications with supporters
- Ability to view situations from a supporter's perspective and adapt behaviour and communications appropriately.
- Collaborative team player, willing to learn from others and share their knowledge
- Ability to manage own time and to identify when they need to seek advice to manage priorities and meet deadlines.

6. Dimensions and Limits of Authority

- Has no authority to make variations or propose salary changes
- Cannot dismiss/recruit
- No responsibility for budget/expense sign-off

7. Duties and Key Responsibilities

Trust fundraising responsibilities

- To present the charity's work (narrative and financial) in clear and compelling proposals and reports that are suitable for trusts and grant givers.
- To identify and research prospects from sources both online and offline.
- To develop and deliver mailings as well as tailored applications to medium sized trust prospects and donors.
- To maintain high quality, accurate and up-to-date information on the fundraising database, ensuring information is gathered and recorded in accordance with the Data Protection Act and the charity's Data Protection Policy
- To promptly thank donors for gifts and ensure that grant conditions and restrictions are accurately recorded and communicated internally.
- To support the organisation of stewardship or cultivation events through practical logistic arrangements and pre- and post-event administration.



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Case for support responsibilities

- To help research, collate and maintain a database of project descriptions of Sue Ryder's current service provision and planned future developments. Including project information, data, costings and case studies for fundraisers to use.
- To respond to service information requests from fundraising teams ranging from short concise descriptions of small-scale projects to more detailed descriptions of complex areas of Sue Ryder's work.
- To support the Senior Case for Support Officer's role in other areas such as facts and stats research and the monitoring of restricted income.
- To provide temporary cover for the Senior Case for Support Officer during periods of planned absence.

8. Behaviours

Operate within the Sue Ryder values and behaviours standards:

Supportive:

Our first value is **supportive**. We're here for people when it matters, and that includes each other. We encourage, inspire and help one another, and celebrate success.

The behaviours for this value are **listen**, **respect** and **encourage**.

We will take time to **listen** and understand; **respect** and value each other's differences; and **encourage** and nurture each other.

Connected:

Our second value is **connected**. When we work together, we can achieve so much more for the people we support. We respect that everyone at Sue Ryder plays a vital part in delivering quality care.

The behaviours for this value are **communicate**, **collaborate** and **share**.

We will **communicate** effectively; actively **collaborate** and appreciate each other's contribution; and **share** ideas, experience and knowledge.

Impactful:

Our third value is **impactful**. We find new and inspiring ways to positively impact the people we support – from small gestures to big breakthroughs. This proactive attitude drives us forward to achieve our ambitions and transform lives. The behaviours for this value are **challenge**, **improve** and **deliver**.

We will welcome feedback and constructively **challenge** each other; reflect, learn and continue to **improve**; and each play our part to **deliver** the charity's aims.



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9. General

In addition to the specific duties and responsibilities outlined in this job profile, all Sue Ryder employees should be aware of their specific responsibilities towards the following:

- To adhere to all health and safety and fire regulations and to co-operate with the charity in maintaining good standards of health and safety
- All employees will be expected to familiarise themselves with and comply with the charity's data protection policy and any specific guidance in relation to their role.
- To uphold ethical and professional standards and not behave in a manner that is likely to bring the charity into disrepute.
- Promote and sustain a responsible attitude towards diversity and inclusion within the charity.
- Demonstrate a commitment to on-going registration requirements or any national professional or occupational standards associated with the role.
- Demonstrate a commitment to on-going learning and development and to participate in any training relevant to the role
- Demonstrate a commitment to Sue Ryder's aims and objectives through its core values and behaviours

All employees are expected to be competent with the use of technology and information systems and understand their duties and responsibilities with regard to the appropriate use of personal data including sensitive personal data. They should familiarise themselves with the Data Protection policy found on RyderNet and complete any related training requested of them

This job description is not exhaustive. It merely acts as a guide and may be amended to meet the changing requirements of the charity at any time after discussion with the post holder