

Role Title	Trusts and Foundations Fundraiser
Department	
Hours	37.5
Functions	Reports to the Director of Finance, IT & People
Main Work Location	Whiteley Homes Trust – Walton on Thames, Surrey/Hybrid

### *Role Overview*

As the Trusts and Foundations Fundraiser practitioner for The Whiteley Homes Trust (TWHT) you will use your core knowledge and skill to reflect on strategy, relationship building and leading our charitable profile and income streams for the next 10 years.

You will develop and influence strategy formation with supporters and other stakeholders to identify and actively seek out and engage trusts, foundations, and other funders by writing compelling and comprehensive funding bids, presentations, and applications.

Working collaboratively with Senior Management Team to enhance stewardship to enable creative, effective, and appropriate activities to promote the development of sustainable engagement with supporters.

### *Whiteley Trust Core Values:*



Respect



Integrity



Ambition



Involvement

We encourage all our staff to play their part in demonstrating our core values in their day-to-day work with colleagues and customers

### *What you will be doing*

Reporting to the Director of Finance, IT & People, you will work towards creating and managing a portfolio of trusts, foundations and grant making bodies leading and managing a new Trusts and Foundations programme.

#### **Principle Objectives**

- Lead the development of the Trust's fundraising strategy to achieve income targets.
- Research and identify organisations whose charitable purposes align with TWHT objects as a charity.
- Maintain a prospective pipeline of potential funding opportunities.
- Create cases for support that are robust and compelling.
- Make applications and secure funding from trusts, foundations, and other organisations.
- Develop new bids and cases for support.
- Draft and submit funding reports to donors within agreed timescales.

- Ensure all donors are engaged and facilitate excellent stewardship including face to face meetings wherever possible.
- Work alongside the Senior Management Team to maximise all opportunities for new and innovate fundraising approaches.

## **Duties and responsibilities**

### **Fundraising**

- Research and manage a pipeline of opportunities for suitable trusts and foundations.
- Write and submit high quality bespoke complex funding proposals in line with the Trust's strategy and priorities.
- Provide a monthly progress update to the Senior Management Team and a quarterly update to the Trust board.
- Work closely with the line managers to understand their needs and how fundraising can best support them.
- Be fully updated with knowledge of the Trust's overall strategy and plans to enable creation of innovation.
- Attend and present at a range of events including external meetings delivering presentations that will inspire others to donate to the charity.
- Keep abreast of the funding climate, trends, and different sources of funding available for each of the very diverse areas of the Charity's work.
- Lead on all fundraising policies and protocols.
- Work closely with the Head of marketing and communications to ensure all opportunities for maximising the publicity of the work of the charity can be utilised.

### **Stewardship**

- Ensure timely acknowledgement of all donations and grants and meet donors reporting requirements including thank you letters, evaluation assessments, milestones and KPI progress and other bespoke stewardship opportunities.
- Conduct excellent account management, meeting existing donors and required developing long term relationships.
- Develop and maintain a complex multiyear engagement and communications and stewardship programme with donors that includes tours and the opportunities for external stakeholders to better understand our work.

### **Database**

- Establish and maintain a donor database ensuring maintenance of up-to-date, records of relevant trusts and Foundations including interactions or communications (to be shared with the Head of Communications and marketing)
- Maintain accurate records of opportunities, proposals, expressions of interest.
- Maintain accurate and up to date records of pledges, donations, and associated acknowledgments.
- Analyse data and research on supporters and environments to inform insights and ensuring material and information is shared and explored.

### **Administration**

- Follow up approaches and check progress to ensure outcomes can be monitored with service delivery staff and finance.
- To contribute to budget preparations to support fundraising applications.
- Consult with the finance department to ensure that all trust pledges and ongoing annual grants are received.
- Establish and maintain high quality relationships of access to the organisation with staff,

volunteers, beneficiaries, and Trustees.

- Establish and maintain a database of donors.
- Keep up to date with fundraising legislation and adhere to the fundraising code of practice, the chartered institute of fundraising best practice as well as relevant fundraising and GDPR requirements.

**Additional**

- Attend out-of-hour functions, meetings or events as required.
- Attend all mandatory training and take personal responsibility that Health and Safety and Hazard Reporting policies and procedures are adhered to, both individually and for the wider reception team
- Ensure the principles and values of the Trust are understood and communicated, and report and resolve any concerns in relation to a breach of policy or of authority.
- Ensure confidentiality is maintained at all times.
- Ensure all Polices of TWHT are adhered to at all times including those regarding safeguarding and GDPR.

**General**

- It is the duty of all employees to ensure that a safe working environment and safe working practices are maintained at all times. It is also the responsibility of the management team to ensure full compliance.
- Undertake any other duties which may be reasonably deemed to come within the scope of the post, relating to the activities of the department.
- Ensures full compliance with all the Trusts' Policies and Procedures
- To complete mandatory and job-related training as required
- You will be responsible for the confidentiality, integrity, and availability of all data which you have access to in the course of your work. You must not disclose any information of a confidential or sensitive nature about the Trust, any of our service users or any of our employees. There is an exception if you need to share this information as part of your job or if you are made to by law.

<i>What you will need</i>		
	<i>Required</i>	<i>Preferred</i>
<i>Skills &amp; Knowledge &amp; Experience</i>	<ul style="list-style-type: none"> <li>• Demonstratable knowledge and experience of trusts and grants fundraising in a complex organisation.</li> <li>• Experience of prospecting, writing, and managing the application process and developing stewarding funder relationships</li> <li>• Ability to develop relationships with a broad range of stakeholders: trustees, beneficiaries, staff, commissioners, volunteers, donors.</li> <li>• Ability to be supportive in other fundraising functions including fundraising events and marketing plans.</li> <li>• Good communicator with excellent written and verbal communications skills with staring attention to detail and organisational ability to meet deadlines.</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of the health/housing sector would be advantageous</li> </ul>

	<ul style="list-style-type: none"> <li>• Excellent IT skills and the ability to interpret data.</li> <li>• Demonstratable ability to plan, prioritise and work proactively and under own initiative.</li> <li>• Strong consultancy skills, including listening, collaborative working, and the ability to form relationships and optimally influence across a range of partners.</li> <li>• Ability to inspire and motivate colleagues.</li> <li>• Ability to work under pressure and as part of a small team with minimal supervision and direction.</li> <li>• Demonstrate a proven ability to meet targets and KPI's</li> </ul>	
<i>Personal Qualities</i>	<ul style="list-style-type: none"> <li>• A proactive problem-solver who works with initiative at all times.</li> <li>• Team player with a flexible, can-do approach to work</li> <li>• Proven planning and organisation skills</li> <li>• Passion for the charitable sector</li> <li>• Proven ability to work under pressure with a high degree of accuracy and to tight deadlines, ensuring others in the team do the same.</li> <li>• We are looking for the following behaviours and attitudes; Inclusive, Innovative, Resilient, Ethical, Empathetic</li> </ul>	
<i>Qualifications</i>		<ul style="list-style-type: none"> <li>• A relevant degree or qualification</li> </ul>

### *Other information*

WHT is committed to safeguarding and promoting the welfare of its staff and older people. We expect all our staff to be aware of their responsibility to protect staff and residents from abuse or harm. Successful applicants will be required to undertake a DBS check and to provide proof of their right to work in the UK.

**Note:** No Role profile can cover every issue that may arise within the duties of the post at various times. The post holder will be expected to perform any other duties from time to time that are broadly consistent with those in this document.