The Passage

Everyone deserves a place to call home

JOB DESCRIPTION

POST:	Trusts and Foundations Manager
Contract:	Permanent
Salary:	£43,944 p/a (NJC SP28-30) inc. LW + pension and other benefits
Hours:	40 hours per week excluding breaks (at least three days a week in the office)
Annual Leave:	34 days per year including Bank/Statutory Holidays
Probation Period:	3 months
Notice Period:	3 months
Accountable to:	Senior Philanthropy Manager

JOB PURPOSE

The Passage's philanthropy portfolio has grown significantly over the last **four** years through dedicated relationship management and compelling applications that have brought to life the fantastic work and outcomes achieved by The Passage's services. A recent audit of our Trusts and Foundations programme identified further opportunities for growth with both newly created and well-established funders.

The Passage's three-year strategy, The Art of the Possible, is based around the themes of prevention, convening and sustaining, and highlights the importance of collaboration. The Fundraising, Communications and Trading team are seeking a passionate, articulate, and experienced individual to further enhance and sustain our trusts and foundations income stream so that The Passage can support more people to find a place to call home.

We are looking for a motivated and creative individual to join our high performing and fast-paced Fundraising, Communications and Trading team at an incredibly exciting time. The impact of the cost-of-living crisis means that there continue to be vital new projects that need funding, and we believe that there are further opportunities for growth to support these.

The Trusts and Foundations Manager is responsible for driving income generation from charitable trusts and foundations. This position requires a strategic thinker with strong writing skills, attention to details and the ability to work collaboratively across all departments to gather insights, data, and case studies to demonstrate the value and effectiveness of The Passage's work.

MAIN TASKS AND DUTIES

- **Account Management and Relationship Building**

  - Lead relationships with a mid-level portfolio of trusts, foundations, and other grant-making bodies to establish a robust pipeline of sustainable income

  - Provide an effective, exemplary stewardship programme for supporters to maximise income and establish donor loyalty existing trust donors and prospects to ensure repeat gifts or increased support where relevant

  - Create innovative opportunities and develop high-quality funding proposals that match funding opportunities to The Passage's range of services

- **Reporting:**

  - Work with the Senior Philanthropy and Frontline Managers to gather narrative, outcomes and case studies to keep donors and funders engaged and informed of our work

  - Prepare robust, timely and compelling reports for all trusts and grant donors, accurately updating funders on passage outcomes and achievements

- **Prospect Research**

  - Research, identify and approach prospective new trust and grant donors and cultivate relationships to grow the existing portfolio and generate additional income

  - Support the Senior Philanthropy Manager to cultivate new funder relationships by introducing new grant makers to our work through tours, events, and good communications

  - Support the Senior Philanthropy Manager to develop the prospect pipeline with the aim of multi-year income

- **Budgets and planning:**

  - Support the Senior Philanthropy Manager to prepare an annual budget
  - Work with the Senior Philanthropy Manager and Head of Development to regularly monitor income against forecast and review fundraising trends, providing narrative and operational updates about your portfolio of funders Monitor performance against agreed PDP to ensure activity is on track.
  - Maintain accurate records on the Saleforce database and ensure donor records are compliant.

GENERAL RESPONSIBILITIES

- In conjunction with your Line Manager to continuously developing the role to ensure that all tasks are being undertaken in an effective and appropriate manner which meets the strategic aims and objectives of The Passage.
- **Attend special events when required. If these are outside normal contracted hours, equivalent time off in lieu (TOIL) will be accrued and may be taken at a mutually agreed time.**
- To participate in internal/external meetings as required, and attend training events, conferences, and other functions, as necessary.
- To participate in regular supervision and annual appraisal and help in identifying your own job-related development and training needs.
- To ensure that all The Passage policies and procedures are being adhered to, particularly those relating to Health and Safety, the Code of Practice and Confidentiality.
- To contribute to the effective implementation of The Passage's Diversity and Equality Policy as it affects both The Passage and its work with vulnerable adults.
- To at all times undertake your role in a professional manner maintaining a high-quality standard of work, and to always work in accordance with the aims, values, and ethos of The Passage[1].

Person Specification: Trusts and Foundations Manager

This specification sets out the essential abilities and qualities which are used in the selection criteria for the post. When completing your supporting statement please address criteria E1 to E10 and K1 to K5 demonstrating your understanding and knowledge and giving evidence of your experience and abilities.

EXPERIENCE

E1 Experience of writing successful fundraising applications and proposals.

E2 Demonstrable track record of achieving financial targets from trusts and foundations, grant-making bodies, and major donor supporters.

E3 Experience of cultivating new prospects and converting them to become warm donors.

E4 Proven stewardship skills with the ability to inspire and retain support from trusts, foundations, and other grant-making bodies.

E5 Ability to undertake in-depth prospect research and data analysis.

E6 Experience of matching funding opportunities to support specific areas of

[1] **Vincentian Ethos** as a Vincentian organisation, The Passage strives to be inclusive, encompassing a diverse and rich culture from within our members, clients, volunteers, and staff. This approach is reflected in our core Values, and it is important that all staff have respect for this. (refer to full Vincentian Ethos Statement).

work/projects/service provision.

E7 Experience of preparing and submitting monitoring and evaluation reports.

E8 Excellent information technology skills, with experience of fundraising databases.

E9 Experience of working with or within the voluntary sector. (Desirable)

E10 Experience of securing new funding from trusts or grant-making bodies. (Desirable)

KNOWLEDGE

K1 Up to date knowledge of trust and foundation prospects, particularly those most suited to supporting the work of The Passage.

K2 Able to understand budgets and summarise financial information

K3 Knowledge and expertise of working with CRM systems to effectively manage donor relationships.

K4 Educated to degree level or equivalent. (Desirable)

K5 Relevant qualification in fundraising. (Desirable)

How we behave at work matters. This Competency Framework sets out the knowledge, skills and behaviours we need to do our jobs well. They give the detail on how we can put our values into action, informing how we work with each other and the people who use our services. We should use our Competency Framework when we recruit new staff and volunteers, appraise performance and when we develop our careers at The Passage.

For each competence, staff should consider whether they are:

Developing	**Achieving**	**Excelling**
Some evidence of demonstrating this competence, with some areas of concern/under performance.	Evidence of demonstrating this competence to a satisfactory level, with room for development.	Evidence of consistently exceeding expectations in this competence.

1 Values led performance

Our work is reflective of The Passage values:

- Seeing the big picture: We have an in-depth understanding and knowledge of how our role fits with and supports The Passage's objectives and our client's needs.
- Respect for others: We respect, treat and value each person as an individual, and recognise that the views and experiences of people from different backgrounds and with different experiences make us a stronger organisation.
- Effective communication & influence: We show pride and passion for The Passage and the services we deliver. We communicate purpose and direction with clarity, integrity, and enthusiasm.
- Hands on hard work: We are self-motivated, proactive and demonstrate a willingness to get involved and help others whenever possible.

2 Client centred working

We provide quality services to our enable our clients to thrive:

- Excellent customer service: We continuously strive to provide the highest level of customer service within our roles, responding positively to feedback and learning opportunities.
- Commitment to quality services: We are committed to providing excellent services to our clients, colleagues and supporters. We incorporate our core values and our knowledge of good practice into every aspect of our work.
- Making effective decisions: We make informed decisions based on sound judgment, evidence, and knowledge, always prioritising the best interests of The Passage, our clients, and our people. We empower individuals to know when and how to make decisions
- Creative problem solving: We handle complex situations and problems with innovation and creativity

3 Effective professional practice

We reflect on our own practice and the skills that are required to continuously improve.

- Readiness to change: We are curious, positive, agile and resilient, and that's how we deal with change.
- Planning & organising: We think ahead, managing time, priorities and risk. We develop structured and efficient approaches to deliver our work in a timely way and to a high standard.
- Analysis & problem solving: We ensure that we have sufficient evidence to make informed decisions and look outside of traditional solutions when appropriate.
- Continuous professional development: We are aware of our own abilities and areas for growth, as well as those of our colleagues. We are committed to continually learning so that we improve our own performance and inspire others to do the same.

4 Working together

We work positively together, knowing that collaboration and mutual support make us stronger.

- Leadership: We lead and take responsibility within our work areas. We demonstrate pride and passion for our clients, communicating purpose and direction with clarity, integrity, and enthusiasm.
- Collaboration & partnership: We work positively together, knowing that collaboration, partnership and mutual support makes us stronger.
- Reliability and communication: We are reliable and complete work commitments to agreed standards of accuracy, quality and time. We communicate effectively and appropriately, adapting communication styles as required.
- Connection: We behave with authenticity, empathy, & emotional intuition. We respect professional boundaries, and we build positive professional relationships.

