

## Trusts, Foundations & Philanthropy Officer

### Role Description

|                     |                                                                      |
|---------------------|----------------------------------------------------------------------|
| Division:           | Fundraising & Marketing                                              |
| Department:         | Fundraising                                                          |
| Location:           | Scotland based, with a blend of office (Edinburgh) and home working. |
| Geographical focus: | Scotland-wide                                                        |
| Contractual status: | Permanent                                                            |
| Hours:              | 35 hours per week, flexible working patterns available               |
| Line Manager:       | Fundraising Manager                                                  |
| Direct Reports:     | None                                                                 |
| Salary:             | £34,250 - 35,910 pa                                                  |

### Job Purpose

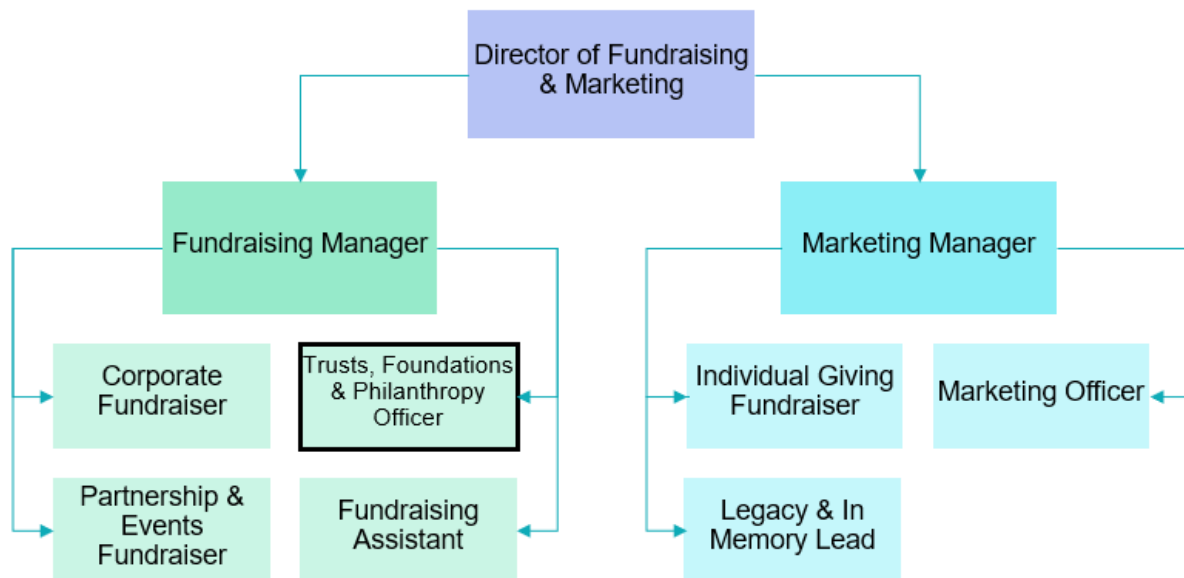
Our vision is that no one in Scotland faces the challenges of older age alone. To help us achieve that, our fundraising activity aims to increase income, build lasting supporter relationships and raise Age Scotland's profile and impact across Scotland.

As the Trusts, Foundations & Philanthropy Officer, you will be responsible for developing and securing financial support from a diverse portfolio of charitable trusts, foundations, statutory funders, lottery funders and philanthropic supporters. You will identify, cultivate, apply to and steward funders and donors, securing both restricted and unrestricted income to support Age Scotland's vital work.

Working collaboratively with colleagues across the organisation, you will develop compelling funding proposals, applications, impact reports and cases for support, ensuring funders and donors understand the difference their support makes.

Living our values, you will play a vital role in delivering sustainable income growth and supporting Age Scotland's ambitious plans for the future.

### Team Structure



### What you'll do

#### Trusts, Foundations and Statutory Funding

- Develop and manage a portfolio of charitable trusts, foundations, lottery funders and statutory funders, securing both restricted and unrestricted income.
- Research, identify and qualify new funding opportunities that align with Age Scotland's strategic priorities. Working with colleagues across the charity to identify emerging funding opportunities and developing projects suitable for external funding.
- Write and submit compelling funding applications, proposals and expressions of interest to secure support for core costs, projects and services.
- Work collaboratively with colleagues across the charity to gather evidence, budgets, impact data and service information to support funding applications and funder evaluation reports.
- Build and maintain strong relationships with funders, ensuring high-quality stewardship.
- Monitor application deadlines, funding opportunities and reporting requirements, maintaining an accurate funding pipeline and calendar.
- Maximise opportunities for multi-year funding and strategic partnerships with funders.
- Where required, work with our communications and marketing team to promote donations and funded work.

#### Philanthropy:

- Identify opportunities to secure gifts, pledges and multi-year philanthropic support.
- Identify, research and cultivate potential philanthropic supporters with the capacity and inclination to make significant gifts.

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- Work with senior colleagues, trustees and ambassadors where appropriate to support donor engagement and cultivation.
- Develop compelling cases for support and funding propositions tailored to donor interests.
- Support the development of a philanthropy programme that grows voluntary income from individual donors over time.
- Build meaningful relationships with donors through personalised communications, meetings, events and stewardship activity.

### Admin and processes:

- Deliver excellent stewardship by appropriately thanking supporters and demonstrating the impact of their support
- Maintain accurate records on the fundraising database and ensure all supporter interactions are recorded effectively.
- Work with finance colleagues to monitor income, expenditure, contracts and invoicing processes.
- Produce accurate income forecasts and contribute to budget setting and monitoring.
- Monitor, evaluate and report on fundraising performance, identifying opportunities for growth and improvement.
- Ensure all activity is run in compliance with the Chartered Institute of Fundraising codes of practice.
- Maintain accurate and up to date records and accept responsibility for the safe and secure handling and storage of confidential information, in accordance with GDPR and Age Scotland's own data protection policies.

### Other Duties:

- Contribute to the development and delivery of Age Scotland's fundraising strategy and annual fundraising plans.
- Work collaboratively with colleagues to maximise opportunities across all fundraising income streams.
- Attend meetings, networking opportunities and events to represent Age Scotland and build relationships with current and prospective supporters.
- Focus efforts where the greatest return can be achieved, ensuring delivery against agreed targets and budgets.

## What you'll bring

### Experience:

- Experience in a trusts, philanthropy or fundraising role.
- Proven success in securing funding from charitable trusts, foundations, lottery funders or statutory sources.
- Experience of developing and managing relationships with donors, funders or other stakeholders.
- Experience of writing successful funding applications, cases for support and impact reports.
- Experience of managing a pipeline of prospects and opportunities.
- Experience of working to income targets and deadlines.

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- Experience of gathering and interpreting data from multiple sources to support funding applications and reporting.
- Experience of presenting, pitching or representing a charity to a variety of audiences.
- Experience of monitoring budgets.
- Experience in project management, reporting and analysing results (desirable).
- Experience of use of CRM database (desirable).

### **Knowledge, Skills & Qualities:**

- Excellent relationship-building, stewardship and networking skills.
- Excellent written communication skills with the ability to produce compelling and persuasive funding applications.
- Strong verbal communication and presentation skills and the ability to convey funding needs / pitches verbally to a range of stakeholders.
- Ability to influence and engage a wide range of stakeholders.
- Excellent organisational skills and ability to manage competing priorities.
- Strong analytical and financial skills, including interpreting project budgets and funding requirements.
- Ability to work independently while collaborating effectively across teams.
- The ability to work across varied teams within a charity or organisation to understand their impact and funding needs.
- Knowledge of current fundraising trends, philanthropy and sector best practice.
- Understanding of fundraising regulation and data protection requirements.

### **Additional requirements**

- Commitment to the aims and vision of Age Scotland and the ability to demonstrate our values (Empowering, Inspiring, Inclusive & Integrity) in your work.
- Commitment to equality, diversity and inclusion.
- Commitment to work alongside and support volunteers.
- An understanding of and commitment to equal opportunities.
- Willingness to work from the Edinburgh Office as part of your role (NB, travel costs from home to the office will not be reimbursed by Age Scotland.)
- Willingness to travel throughout Scotland with flexibility to work occasional evenings and weekends when required.
- Employees are expected to have a suitable homework space with a good broadband connection.
- Employees are expected to undertake any and all other reasonable and related tasks allocated by their Line Manager.
- Employees enrolled in Multi-Factor Authentication (MFA or 2FA) will be expected to install and maintain an app on either their personal or work mobile device.