

ROLE & TEAM MEMBER PROFILE

ROLE SUMMARY	
Role Title	Trusts and Foundations Officer
Reports To	Trusts and Foundations Manager
Division	Charity
Team	Fundraising
Location	Hybrid working with attendance in Midlands office as required and occasional travel to meetings and events.
ROLE PURPOSE	
<p>The Trusts and Foundations Officer will play a key role in supporting the delivery of the Trusts and Foundations fundraising strategy, helping to secure income from charitable trusts, foundations, statutory funders and other grant-making bodies.</p> <p>Working closely with the Trusts and Foundations Manager, the post holder will identify funding opportunities, develop compelling funding applications, manage reporting requirements and build strong relationships with funders. Success in this role will require excellent written communication skills, strong organisational abilities and a proactive approach to fundraising.</p> <p>The post holder will work collaboratively across the organisation to gather information, develop funding proposals and demonstrate impact, contributing to the achievement of ambitious income targets and sustainable growth.</p>	
ROLE KEY ACCOUNTABILITIES	
<p>Trusts and Foundations Fundraising</p> <ul style="list-style-type: none"> • Support the implementation of the Trusts and Foundations fundraising strategy to maximise income from charitable trusts, foundations and statutory sources. • Research and identify prospective trusts, foundations and grant-making organisations aligned with organisational priorities and funding needs. • Develop and submit high-quality, compelling funding applications, expressions of interest, letters of enquiry and supporting documentation. • Maintain a robust pipeline of funding opportunities up to 6 figures, supporting on large bids and significant opportunities and ensure timely progression of prospects through the fundraising cycle. • Work closely with internal stakeholders to gather information, budgets, outcomes and impact data required for funding applications. • Securing income directly and achieving agreed income targets and key performance indicators. • Assist in developing restricted funding proposals for existing and new projects and services. • Maintain accurate and up-to-date records of funder interactions, applications, reports and outcomes within the CRM system. • Monitor application deadlines, reporting schedules and funding renewal opportunities to ensure compliance and maximise income potential. • Prepare funding reports, impact reports and stewardship communications for existing funders. • Support the cultivation and stewardship of trust and foundation relationships through effective communication and engagement. • Assist with the preparation of funding presentations, case for support materials and supporting fundraising documentation. <p>Relationship Management and Stewardship</p> <ul style="list-style-type: none"> • Build and maintain positive relationships with trust and foundation funders. • Act as a professional and knowledgeable representative of the organisation when engaging with funders and stakeholders. 	

- Support funder visits, meetings and engagement opportunities where appropriate.
- Ensure all funders receive timely acknowledgements, updates and reports in line with agreed requirements.
- Work collaboratively with colleagues across fundraising, service delivery, finance and communications to ensure effective donor stewardship, develop stories, and demonstrate impact.
- Maintain accurate records of fundraising activity, income, applications and outcomes.
- Monitor and report on fundraising performance against agreed targets and objectives.
- Assist in the preparation of income forecasts, pipeline reports and performance updates.
- Ensure compliance with organisational policies, funding agreements and relevant regulatory requirements.
- Contribute to the continuous improvement of fundraising processes, systems and practices.
- Keep up to date with developments and trends in trusts and foundations fundraising and share learning with colleagues.
- Work collaboratively with colleagues across the organisation to support strategic objectives.
- Demonstrate commitment to the organisation's values and mission.
- Attend team meetings, training and organisational events as required.
- 15. Undertake any other duties reasonably required by the Trusts and Foundations Manager or wider Fundraising leadership team.

TEAM MEMBER REQUIREMENTS

- Evidence of continuing professional development relevant to fundraising.
- Experience of applying to statutory sources
- Experience of researching and applying to charitable trusts, foundations or grant-making organisations.
- Experience of writing compelling funding applications, reports or proposals.
- Experience of managing multiple projects, deadlines and competing priorities.
- Experience of CRM systems - Raisers Edge and Beacon.
- Experience of working collaboratively with a range of internal and external stakeholders.

Skills, Knowledge and Personal Approach

- Excellent written communication and proposal writing skills.
- Strong attention to detail and accuracy.
- Excellent organisational and time management skills.
- Ability to interpret and present complex information clearly and persuasively.
- Strong research and analytical skills.
- Confident use of Microsoft Office applications and CRM databases.
- Ability to build positive working relationships with colleagues and external stakeholders.
- Self-motivated with the ability to work independently and as part of a team.
- Flexible and proactive approach to work.
- Commitment to the values and mission of the organisation.

Desirable

- Experience of securing five-figure and six-figure grants.
- Experience of working within the charity sector.
- Knowledge of trust and foundation fundraising best practice.
- Experience of using fundraising CRM systems such as Raiser's Edge, Donorflex or Salesforce.
- Membership of, or commitment to, professional fundraising networks and development.
- Maintain a robust pipeline of funding opportunities up to 6 figures, supporting on 7 figure opportunities and ensure timely progression of prospects through the fundraising cycle