



## Job Description and Person Specification

Please note this statement is for information only and does not form part of a contract. This list is not exhaustive and you will be expected to undertake such duties as may be assigned to you by ActionAid from time to time. Staff are expected to be flexible in their work in order to deliver the objectives of the organisation.

<b>Job title</b>	Trust and Foundations Executive	<b>Contract length</b>	N/A
<b>Contract type</b>	Permanent	<b>Date</b>	March 2011
<b>Grade/Starting salary</b>	4 / £30,074 – £32,197		

### Context

ActionAid doesn't just tackle the effects of poverty. We also change what keeps people poor. ActionAid improves people's lives every day. But we know that's not enough. So we work relentlessly to change whatever is keeping them trapped in poverty. This means we have a better chance of ending poverty for good.

ActionAid is an international development charity. Formed in 1972, we have been growing and expanding to where we are today – working with over 13 million of the world's poorest and most disadvantaged people in 42 countries worldwide.

The Major Gift team is part of ActionAid UK's Fundraising department which has 70 staff located on two sites, in London and Chard. The fundraising programme currently generates £50 million from voluntary sources. Our fundraising goals are to attract long term support to provide stable and predictable income through committed gifts, strategic funding partnerships and by providing the best possible supporter experience.

ActionAid was the first UK charity to introduce child sponsorship and we continue to develop this as one of our core products along with other ways of attracting committed gifts.

The Major Gift team is tasked with raising funds from high net-worth individuals, trusts/foundations and companies. This is a new and exciting role and is part of a restructure aimed at increasing our capacity to harvest substantial gifts and to deliver ambitious income growth to support ActionAid's work.

### Main purpose of the role

To initiate and build relationships with trusts and foundations to secure their financial support of ActionAid. This role manages relationships with a portfolio of existing and prospective grantmaking trusts that are able to make grants of up to £25,000.

Trusts and foundations are also currently managed by:

- Trusts and Foundations Manager – Managing existing and prospective trusts with the ability to give £25k+.
- Senior Major Gift Managers – who manage a small number of family trusts/foundations with the ability to give £25k+, where there is an existing relationship and/or where grant decision making is usually driven by one or more family trustees who are spending money that they have earned.
- Programme Funding Officers – who manage a small number of official grant givers



## Management and key relationships

Staff managed

N/A

Reports to

Trusts and Foundations Manager

Key Relationships

Externally: trusts/foundations – their trustees, administrators and other staff

Internally: Major Gifts Team colleagues; Research and Information Team; Programme Funding Team; other fundraising teams; Events Officers; International Market Development Manager, Data and Insight Team, AA-UK's Senior Management Team.

<b>Main Duties</b>		
<b>Duty</b>		<b>% Time</b>
<b>1</b>	<b>Research, cultivation and solicitation of grants</b> <ul style="list-style-type: none"> <li>Account manage a portfolio of over 50 existing and prospective trust/foundation donors</li> <li>Research and evaluate prospective trust donors (with some support from the Research and Information Manager)</li> <li>Identify matches between grantmakers' funding guidelines and ActionAid projects in need of funding (with some support from the Project Information Team)</li> <li>Using priority project and core proposals where possible, submit well targeted funding applications and produce timely narrative and financial reports</li> <li>Raise awareness of ActionAid's mission, vision and values and inspiring prospective donors to engage with and support its international development and humanitarian work</li> <li>Meet with donors and prospective donors at ActionAid major donor events and following up with those who attended after the event with any agreed actions and to advance the relationship</li> </ul>	At least 50%
<b>2</b>	<b>Communication and stewardship</b> <ul style="list-style-type: none"> <li>Understand and communicate ActionAid's work persuasively to prospective trusts mainly by written means</li> <li>Working with the Research and Information Team and the Trust Executive, develop and use priority projects/ core proposals where possible</li> <li>Report back to donors on projects supported in a timely manner ensuring good communication with country programmes</li> <li>Ensure that donors are thanked promptly as soon as gifts are received</li> </ul>	20%
<b>3</b>	<b>Planning and team working</b> <ul style="list-style-type: none"> <li>Work closely with the Programme Funding Team to identify funding opportunities, for example through matched funding</li> <li>Attend regular team meetings and occasionally representing the team in cross-organisational working groups, especially with other fundraising teams</li> <li>Contribute to the team's annual planning and the organisation's wider planning process</li> </ul>	10%
<b>4</b>	<b>Data management</b> <ul style="list-style-type: none"> <li>Maintain up to date records of all communications with trusts/foundations and enter other pertinent information in a timely and accurate manner on the Raisers Edge supporter database and in line with data protection legislation</li> <li>Support the Trust Manager when needed</li> </ul>	5 -10%
<b>5</b>	<b>Best practice</b> <ul style="list-style-type: none"> <li>Keep up to date with trends in the funding environment and on best practice in trusts fundraising</li> </ul>	Less than 5%
<b>6</b>	<b>Financial monitoring and support</b> <ul style="list-style-type: none"> <li>Complete tracking forms for the Senior Major Gift Team</li> <li>Process expense forms / invoices for Major Gift Team</li> <li>Support Head of Major Gifts with reconciling monthly accounts</li> <li>Monitor individually achieved income in relation to targets and be able to explain any variances in performance</li> </ul>	Less than 5%

## **Person Specification**

### **Knowledge, skills and experience: key requirements**

	<b>Requirement</b>	<b>Evaluation</b>
1	A proven ability to achieve financial targets from trusts/foundations	
2	Polished writing skills, with the ability to adapt the style of writing to a range of different communications	
3	Fluency in written English	
4	The confidence to initiate and maintain relationships with donors mainly by written means	
5	The ability to articulate complex issues in a compelling and persuasive manner	
6	Experience of researching trusts and foundations and evaluating their propensity to offer grant support	
7	Good numerative and analytical skills and the ability to interpret the salient information from a financial budget	
8	The ability to schedule and manage a range of projects and tasks and to meet key deadlines	
9	Meticulous attention to detail	
10	Commitment to equal opportunities and to ActionAid's mission, vision and values	

### **Competencies**

	<b>Requirement</b>	<b>Evaluation</b>
1	<b>Action</b> The desire to accept ownership and accountability, whilst getting things done well and meeting challenging goals	
2	<b>Planning</b> The ability to plan ahead and effectively prioritise, ensuring that the resources required to implement the action will be available, and scheduling work required to achieve an end result	
3	<b>Innovation</b> The ability to originate, introduce and be open to, new practices, concepts, ideas and change and to continuously improve	
4	<b>Communication</b> The ability to get our points across clearly, both orally and in writing, to ensure we get our key messages across in the right way	
5	<b>Collaboration</b> The ability to work co-operatively and flexibly with others, both within and outside the organisation, demonstrating an understanding of effective team working and partnerships	

### **Knowledge, skills and experience: desirable**

	<b>Requirement</b>
1	Experience of using fundraising databases
2	An understanding of international development and/or humanitarian relief work