



Updated June 2011
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.

Job title	Trusts and Foundations Manager		
Contract type	Permanent	Contract length	-
Grade/Starting salary	5 / £35,098 - £37,575 per annum	Date	June 2011

Context

Are you passionate about making a real difference?

As part of the global ActionAid family, we are helping to build a fair and just world where everyone can claim their rights. To achieve this we work with local people in more than 45 countries to fight hunger and disease, seek justice and education for women, hold companies and governments to account and help communities cope with emergencies.

In the UK our role is to raise funds to carry out programme work internationally, to motivate and engage our supporters and the general public and to campaign for change. We are a value driven, forward thinking organisation, focused on achieving long-term change through supporting our partners to make a sustainable difference.

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. Our focus is on those donors with the ability to make five, six and seven figure gifts and grants. This new post has been created as part of a restructure of the team that is 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 new role will manage relationships with a portfolio of existing and prospective grantmaking trusts that are able to make grants of £50,000 or more, with a particular focus on six figure grants and on multi-year funding agreements.

This role will have a particular focus on bringing in new business for ActionAid, from corporate trusts and from those trusts where it is more difficult to influence grant decision making.

Trusts and foundations are also currently managed by:

1. Senior Major Gift Managers – who manage a small number of family trusts/foundations

- 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.
2. Programme Funding Officers – who manage a small number of larger trusts/foundations that have professional staff, operate rigorous grant guidelines and where there is complex grant management and/or programme development (i.e. funding additional work that was not originally budgeted/planned).

A key dimension to this role will involve the management of these boundaries and being involved in decision making (with the Head of Major Gifts and Head of Programme Funding) on which trusts/foundations should be managed by whom.

Staff managed	None
Reports to	Head of Major Gifts Team

Main Duties		
Duty		% Time
1	<p>Donor cultivation and solicitation of grants</p> <ul style="list-style-type: none"> • Account manage a portfolio of over 50 existing and prospective trust/foundation donors • Research and evaluate prospective trust donors (with support from the Research and Information Manager) • Identify matches between grantmakers' funding guidelines and ActionAid projects in need of funding (with some support from the Research & Information Team) • Develop individual approach strategies for each trust in the portfolio (with guidance from the Head of Major Gifts) • Understand and communicate persuasively ActionAid's work to prospective donors by preparing well targeted funding applications, pitches and presentations and by all other written and verbal means • Prepare project budgets and monitor expenditure when reporting back to funders • Monitor on a regular basis trusts/foundations' funding interests, income and expenditure trends, information about trustees, application procedures etc • Raise awareness of ActionAid's mission, vision and values and inspire prospective donors to engage with and support its international development and humanitarian work • Identify opportunities to develop relationships with trust/foundation staff and individual trustees and to involve country programme staff in occasional meetings and written communications • Solicit grants at face to face meetings (for some trusts), sometimes involving senior colleagues or peer to peer volunteers in meetings and in making the ask • 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 • Ensure that donors are thanked promptly as soon as grants are received • Accompany selected donors on overseas trips to visit ActionAid's work in the field and to increase the donors' emotional engagement with the cause 	At least 60%
2	<p>Reporting and grant management</p> <ul style="list-style-type: none"> • Liaise with country programme staff (with support from the Project Information team) to coordinate funding related communications, ensuring that donor criteria are understood and implemented 	30%

	<ul style="list-style-type: none"> Prepare timely narrative and financial reports for donors on the outcomes of the work funded and in accordance with the donors' reporting requirements 	
3	Income monitoring and team planning <ul style="list-style-type: none"> Monitor individually achieved income in relation to targets and be able to explain any variances in performance Work closely with the Programme Funding Team to identify funding opportunities, for example through matched funding Attend regular team meetings and represent the team in cross-organisational working groups, especially with other fundraising teams Contribute to the team's annual planning and the organisation's wider planning process 	5%
4	Best practice and knowledge management <ul style="list-style-type: none"> 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, in line with data protection legislation Keep up to date with trends in the funding environment and on best practice in trusts fundraising Attend occasional meetings on trusts fundraising organised by BOND and the Institute of Fundraising Trusts Special Interest Group 	5%

Person Specification		
Knowledge, skills and experience: key requirements		
	Requirement	
1	A proven ability to achieve financial targets with a track record of securing major grants (including at a six figure level or above) from trusts/foundations	
2	Entrepreneurial, self starter with a proven success in winning new business and target driven	
3	Strong negotiating and influencing skills and the ability to 'close the deal'	
4	The ability to articulate complex issues in a compelling and persuasive manner and experience of making face to face presentations to trust/foundation staff and/or trustees	
5	The confidence to initiate and maintain relationships with donors both on the telephone and face to face as well as by email and other communications	
6	Fluency in written English; polished writing skills, with the ability to adapt the style of writing to a range of different communications	
7	Knowledge and experience of proposal development, grant management (preferably in the international development/aid sector) and familiarity with logical framework methodology	
8	Experience of researching trusts and foundations and evaluating their propensity to offer grant support	
9	Demonstrable numerative and analytical skills and the ability to interpret the salient information from a financial budget	
10	The ability to schedule and manage a range of projects and tasks and to meet key deadlines	
11	Meticulous attention to detail	
12	Ability and willingness to travel overseas and in the UK	
13	Commitment to equal opportunities and to ActionAid's mission, vision and values	

Competencies		
	Requirement	
1	Action The desire to accept ownership and accountability, whilst getting things done well and meeting challenging goals	
2	Planning The ability to think ahead and decide on courses of action, ensuring that the resources required to implement the action will be available, and scheduling work required to achieve an end result	
3	Innovation The ability to originate, introduce and be open to, new practices, concepts, ideas and change and to continuously improve	
4	Communication 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	Collaboration 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		
1	Experience of using fundraising databases	
2	An understanding of international development and/or humanitarian relief work	