**Job description**

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| **Job title:** | Trusts and Foundations Manager  |
| **Department:** | Advancement Office |
| **Salary:** | 7  |
| **Responsible to:** | Head of Trusts and Foundations  |
| **Responsible for:** | n/a  |
| **Location:** | Hybrid (min 2 days office working at Claverton Down campus, Bath) |

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| **Purpose of the job:** |
| As part of our dynamic team, you will play a pivotal role in creating and managing a vibrant fundraising pipeline from trusts and foundations, focusing on donations under £500K. Your role will be to identify, cultivate, and secure significant gifts from both UK and international trusts and foundations, tapping into our extensive alumni network and beyond. Your work will not only secure vital funding but also amplify the impact of our research and educational programs. Key responsibilities include Trusts and Foundation research, identifying suitable University projects for funding, writing funding bids, maintaining relationships with donors through excellent stewardship and by providing regular updates and project reports. You will ensure all contact with Trusts and Foundations is recorded on Raiser’s Edge.  |

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| **Duties and Responsibilities:** |
| 1. **Fundraising:**
* To develop and implement individual prospect strategies, cases for support and proposals, with a focus on making asks, working to an annual fundraising target of £250,000 and contributing to thematic team targets of £1m for Health and wellbeing, digital and sustainability research.
* Identify and manage a portfolio of approximately 25-50 prospective trust and foundations donors (total value £1m) in the UK and overseas, cultivating a relationship between them and the University.
* Work with the Head of Trusts and Foundations to decide how, where, when and by whom the ask should be made. This includes making direct asks in person and coaching senior University management to do the same.
* Working alongside the Communications Team and the Stewardship Team to create materials that support fund-raising and relationship management.
* Maintain an up-to-date knowledge of major funders within the UK and internationally; research trust objectives in order to craft well informed funding bids and ensure that the giving potential of each individual funding body is maximised.
1. **Develop and manage relationships (internal and external):**
* Frequent, proactive and reactive, highly personalised (email, telephone and face-to-face) contact with prospective and current supporters, to build strong relationships, leading to asks for 5 and 6 figure gifts (in face-to-face meetings and in writing).
* Work closely with academic members of staff and colleagues in the Advancement Office to identify sources of funding for projects, in line with the University’s Thematic Priority Areas, to deliver the required investment and to ensure the smooth running of projects
* Establish and maintain regular contact with senior academics who are working on projects for which philanthropic support is sought. Keep abreast of how projects are progressing and work with the stewardship manager to ensure that donors receive timely and appropriate information about the progress and outcome of projects / their support.
* Work closely with the AO prospect research team, and other engagement functions across he University, to establish a collaborative approach to prospect strategy and ensuring that top prospects and donors are managed and approached in the most effective manner for the University’s overall benefit.
1. **Analysis and reporting:**
* Monitor and maintain records and reports of fundraising activities to meet both internal and external requirements.
* Agree specific and quantifiable targets for annual performance and participation and forecast accordingly.
* Analyse performance, present results and put forward recommendations through briefings, presentations and written reports for the Director and senior management.
* Agree and work towards a year-on-year incremental increase in funds raised..
* Use NXT to record / track progress of relationships with prospects and donors effectively and comprehensively, ensuring that all research, contacts and communications are recorded fully and accurately.

Additional requirements of the job:* Demonstrate commitment to the Department’s and University’s plans to develop equality, diversity and inclusion.
* Maintain a good working knowledge of a wide range of academic disciplines, and of social, economic and cultural contexts, so as to write compelling research proposals, alongside the Proposals Officer.
* Adhere to the highest standards of fundraising best practice and ensure that activities comply with the relevant Data Protection and any other legislation.
* Occasionally attend events taking place outside of normal working hours.
* Occasionally travel to attend events and liaise with alumni and potential donors.
* Undertake such other similar duties consistent with the remit and seniority of this role as may be required.
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**Person Specification**

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| **Criteria** | **Essential** | **Desirable** | **Assessed by** |
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| **Qualifications:** |  |  |  |  |  |
| Educated to at least first-degree level or equivalent. | **✅** |  |  **✅** |  |  |
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| **Experience/Knowledge:** |  |  |  |  |  |
| In-depth understanding of fundraising, especially from Trusts and Foundations.  | **✅** |  | **✅** |  |  |
| Have considerable experience in developing partnerships with Trusts & Foundations (or similar), raising 5 and 6-figure philanthropic gifts. | **✅** |  | **✅** | **✅** |  |
| Experience working with a range of stakeholders, in particular senior-level prospects, donors, and colleagues. | **✅** |  | **✅** |  |  |
| Experience in translating complex themes and projects for a lay audience. | **✅** |  | **✅** |  | **✅** |
| A strong awareness of “big picture” issues relating to the political, corporate, and HE sectors, how these affect the development agenda and how funders might seek to engage with the university. |  | **✅** | **✅** |  |  |
| Have a thorough understanding of all relevant legislation relating to data protection and fundraising best practices. |  | **✅** | **✅** | **✅** |  |
| Have a good working knowledge of relationship management databases, ideally Raiser’s Edge NXT. |  | **✅** | **✅** |  |  |
| Experience or knowledge of fundraising in a Higher Education setting. |  | **✅** | **✅** |  |  |
| **Skills:** |  |  |  |  |  |
| Excellent time management skills, with the ability to prioritise a varied and diverse workload. | **✅** |  | **✅** | **✅** |  |
| Ability to work independently, use initiative, and think creatively / laterally. | **✅** |  | **✅** |  |  |
| Excellent attention to detail and accuracy. | **✅** |  | **✅** |  | **✅** |
| Excellent bid writing skills, with the ability to convey complex ideas in an engaging way e.g., through proposal and report writing and data analysis. | **✅** |  | **✅** | **✅** | **✅** |
| Excellent IT skills, including components of Microsoft Office software | **✅** |  | **✅** |  |  |
| **Attributes/Personal Characteristics:** |  |  |  |  |  |
| Excellent time management skills with the ability to prioritise a varied and diverse workload and to work independently with minimum supervision, calmly under pressure, and meet deadlines. | **✅** |  | **✅** | **✅** |  |
| Highly driven and goal-orientated with an entrepreneurial approach. | **✅** |  | **✅** | **✅** |  |
| Proactive and positive approach, willing to take the lead in asking for financial support. | **✅** |  | **✅** | **✅** |  |
| Ability to deal with confidential matters and act with discretion. | **✅** |  | **✅** |  |  |
| Ability and willingness to travel and occasionally work evenings or weekends. | **✅** |  | **✅** |  |  |
| A strong belief in the importance of universities to society, coupled with an understanding of the need to diversify the funding base of these institutions, particularly with philanthropic support and wider corporate engagement. | **✅** |  | **✅** | **✅** |  |
| Confident, personable and able to communicate with colleagues at all levels. |  | **✅** | **✅** |  |  |

\* A = Application, I = Interview, T = Test