

## Trusts Officer Job Description

<b>1.</b>	<b>Main purpose of the job</b>	
	To create, manage and develop relationships between Parkinson's UK and Trust supporters to maximise their lifetime support for the charity.	
	To support the Trust team in implementing the fundraising strategy for trust donors.	
<b>2.</b>	<b>Position of organisation</b>	
	<b>Reports to:</b>	Senior Trusts and Statutory Officer
	<b>Responsible for:</b>	N/A
	<b>Main relationships:</b>	Senior Trusts Manager, Philanthropy Managers, Head of Philanthropy, Director of Fundraising and other Directors, Chairman and Trustees. Research directorate and staff, Support and Local Groups team. Trusts Fundraising, Direct Marketing, Business Development, Individual Giving, Events and Regional Fundraising teams. High value donors and supporters.
	<b>Direct contacts:</b>	As agreed with the Director of Fundraising and Senior Trusts Manager
	<b>Reference points:</b>	High level donors, influencers and grant-making trusts
<b>3.</b>	<b>Brief description of directorate</b>	
	<p>The charity's Fundraising directorate is responsible for developing and implementing a cost effective fundraising and marketing programme from individual donors, trusts, companies and events to maximise long term voluntary income and support.</p> <p>The directorate also manages Parkinson's UK's Legacy Marketing and Membership Marketing programmes, along with the planning, development, sales and distribution of new products and merchandise through the charity's trading subsidiary P.D.S. (Sales) Ltd.</p> <p>The charity is wholly dependent on voluntary donations</p> <p>The Major Gifts team works with Parkinson's UK highest value individual donors, prospects and influencers to generate and grow long-term sustainable income.</p>	
<b>4.</b>	<b>Scope of the job</b>	
<b>A.</b>	<b>To establish, manage and develop relationships with a portfolio of trust donors and prospects that will increase their involvement with Parkinson's UK, leading to increased and sustained financial support.</b>	
<b>B.</b>	<b>To develop and maintain a good understanding of all issues relating to Parkinson's and to remain informed on Parkinson's UK activities.</b>	
<b>5.</b>	<b>Duties and responsibilities</b>	
<b>A.</b>	<b>To establish, manage and develop relationships with a portfolio of trust donors and</b>	

	<p><b>prospects that will increase their involvement with Parkinson's UK, leading to increased and sustained financial support.</b></p> <ul style="list-style-type: none"> <li>• Personally manage relationships with a portfolio of trusts across the UK and potentially overseas.</li> <li>• Research the most appropriate approaches for a portfolio of trusts with the aim of optimising their involvement with and commitment to Parkinson's UK.</li> <li>• Cultivate relationships as appropriate to each trust using the telephone and written contact as appropriate but aiming to meet and speak wherever possible using a range of cultivation opportunities including visits to offices, accompanying them on site visits or to Parkinson's UK local events, invitations to charity receptions, briefings etc.</li> <li>• Using research conducted make full use of the team's contacts and networks wherever possible to ensure approaches for funding are made at an appropriate time for the right topic and amount.</li> <li>• Work closely with operational teams to create and present compelling funding proposals to support the gift request.</li> <li>• Thank donors promptly and appropriately in line with an agreed recognition and stewardship strategy, and ensure that regular progress reports and updates are received by donors as and when required.</li> <li>• Ensure that all donor and prospect records are maintained and updated accurately and promptly on Raiser's Edge and that record keeping is compliant with the charity's Data Protection Policy.</li> <li>• Work with the line manager to ensure that it is possible to deputise in donor contacts where necessary.</li> <li>• Provide regular analyses of the progress and success of own portfolio, as well as maintaining financial monitoring and other administrative systems.</li> <li>• Assist with the management of excellent major donor cultivation networking events (in a range of styles) designed to inform, inspire and influence supporters about the work of the Parkinson's UK.</li> </ul>
<b>B.</b>	<p><b>To develop and maintain a good understanding of all issues relating to Parkinson's and to remain informed on Parkinson's UK activities.</b></p> <ul style="list-style-type: none"> <li>• Build an understanding of Parkinson's, the treatments available and the advances made in the area of research.</li> <li>• Liaise with the Research and Innovation directorate, Strategic Intelligence and Excellence directorate and the Support and Local Groups directorate, in order to keep up-to-date with the latest developments in research and service provision.</li> <li>• Arrange/attend regular meetings with managers and staff in other directorates to ensure that they are fully briefed on the type of activities and information required to maximise support from major individual donors.</li> </ul>
<b>6.</b>	<p><b>General responsibilities</b></p> <ul style="list-style-type: none"> <li>• Contribute to team meetings, team and project working and implementing organisational priorities.</li> <li>• Be flexible within the broad remit of the post.</li> <li>• Take direction on projects and priorities from the Senior Trusts and Statutory Officer, the Senior Trusts Manager, Head of Philanthropy and/or Director of Fundraising.</li> <li>• To assist with work being undertaken by other team members where appropriate</li> <li>• Report monthly against agreed targets.</li> <li>• Abide by the organisational policies and practices, including the equal opportunities policy and code of conduct.</li> <li>• Be self motivating and sufficient.</li> </ul>

<b>7.</b>	<b>Dimensions and Limits of Authority</b>
<b>Disciplinary action:</b>	NA
<b>Budgetary limits:</b>	NA
<b>Authorises expenditure within a budget to a limit of:</b>	NA
<b>Signs contracts and contractual matters on behalf of Parkinson's UK:</b>	NA

This job description does not form part of your contract of employment. The duties laid down in this job description may change from time to time following a review and in consultation between post holder and line manager / Director.

**Trusts Officer  
Person Specification**

		Essential	Desirable
<b>Experience</b>	Experience of personally securing gifts from Trusts.	✓	
	Experience of cultivating relationships and making asks in a variety of ways, such as in writing, by email and face-to-face in order to secure long term relationships and committed income.		✓
	Experience of working with senior staff and/or volunteers.		✓
	Experience of researching Trusts and producing tailored approach plans using networks and contacts where appropriate.	✓	
	Experience of co-ordinating and managing cultivation events or similar project management experience.		✓
	Experience of using a bespoke database such as Raiser's Edge to store donor information and plan approaches.	✓	
	Experience of preparing and managing budgets.		✓
<b>Skills and Abilities</b>	Excellent interpersonal skills and the ability to build effective working relationships with a wide range of people and establish credibility with both donors and colleagues.	✓	
	A good listener, able to interpret the needs of other people and to adapt own plans/responses accordingly.	✓	
	Ability to make formal and informal presentations with confidence to a range of audiences and in a range of settings.		✓
	Excellent written skills, with the ability to turn complex information into clear and compelling proposals and reports for a wide range of audiences.	✓	
	Able to produce a consistently high standard of accuracy in written work and record keeping.	✓	

<b>Knowledge</b>	A good understanding of the Trusts sector and the fundraising mechanisms available for building long term relationships.		✓
	Excellent IT skills, including Microsoft Office, Outlook and databases.	✓	
<b>Education/training</b>	Educated to degree level or equivalent		✓
<b>Other requirements</b>	Empathy with the aims, goals and values of the charity, and a commitment to support delivery to meet these.	✓	
	Willingness to develop an understanding of disability issues.	✓	
	Commitment to working within the principles of equal opportunities.	✓	
	Able to work as part of a team and willing to contribute to strategic thinking and planning as part of the Major Gift team.	✓	
	Willing and able to travel within the UK and to stay away from home overnight occasionally.	✓	
	Valid driving licence and use of car.		✓
	Flexibility about working at weekends and in the evenings to fit in with donor meetings and events.	✓	