

Senior Trusts and Statutory Fundraising Officer

Job Description

1.	Main purpose of the Job	
	<p>To create, manage and develop relationships between Parkinson's UK and Trust supporters to maximise their lifetime support for the charity.</p> <p>To create, manage and develop relationships between Parkinson's UK and Statutory Funding bodies and European Funders to secure income for specific projects and programmes of work.</p> <p>To support the Senior Trusts Manager in implementing the fundraising strategy for trust and statutory donors.</p> <p>To line manage a Trusts Officer and provide support to them in order that they cultivate and maintain successful relationships and meet income targets.</p>	
2.	Position of Organisation	
	Reports to:	Senior Trusts Manager
	Responsible for:	Trusts Officer
	Main relationships:	<p>Senior Trusts Manager, Head of Philanthropy, Director of Fundraising and other Directors, Chairman and Trustees</p> <p>Research directorate and staff, Support and Local Groups directorate, Strategic Intelligence and Excellence directorate</p> <p>Trusts and Foundations, Business Development, Individual Giving, Events and Regional Fundraising teams. Donors, supporters and Statutory Fundraising bodies</p>
	Direct contacts:	Head of Major Gifts, Trusts and Statutory Manager, Country Directors, Service Managers and Regional Fundraising Managers
	Reference points:	Grant-making Trusts, fundraising influencers, Statutory Fundraising bodies and European Funders
3.	Brief Description of directorate	
	<p>The Trusts team sits within the Major Gifts team, which works with Parkinson's UK's highest value individual donors, prospects and influencers to generate and grow long-term sustainable income.</p> <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. Statutory fundraising has been developing in the Countries and Regions and this role will take a lead on making the most of England opportunities, as well as facilitating good cross-fundraising information sharing.</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</p>	

	products and merchandise through the charity's trading subsidiary P.D.S. (Sales) Ltd
4.	Scope of the Job
A.	To establish, manage and develop relationships with a portfolio of trust donors and prospects, leading to increased and sustained financial support of Parkinson's UK.
B.	To create, manage and develop relationships between Parkinson's UK and Statutory Funding bodies to secure income for agreed priority projects and programmes of work.
C.	To develop and maintain a good understanding of all issues relating to Parkinson's and to remain informed on Parkinson's UK activities.
D.	To line manage a Trusts Officer within the Trusts Fundraising Team
E.	To be a strategic theme lead on behalf of the Trusts and Statutory Team , ensuring up to date information is shared and that the team are equipped to fundraise for organisational and strategic led priorities
5.	Duties and Responsibilities
A.	To establish, manage and develop relationships with a portfolio of trust donors and prospects, leading to increased and sustained financial support of Parkinson's UK
	<ul style="list-style-type: none"> • Personally manage relationships with a portfolio of active Trusts across the UK. • Identify, research and contact newly-constituted Trusts as part of a rolling programme, with the aim of introducing the work of Parkinson's UK and soliciting gifts where possible. • Cultivate relationships with 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. • Work closely with operational teams to create and present compelling funding proposals and stewardship materials for current and potential prospects. • 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. • 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. • Work with the Senior Trusts Manager to ensure that it is possible to deputise in donor contacts where necessary. • Provide regular analyses of the progress and success of the portfolio, as well as maintaining financial monitoring and other administrative systems. • Assist with the management of excellent cultivation networking events (in a range of styles) designed to inform, inspire and influence supporters about the work of the Parkinson's UK.
B.	To create, manage and develop relationships between Parkinson's UK and Statutory Funding bodies to secure income for specific projects and programmes of work
	<ul style="list-style-type: none"> • Establish and maintain administrative processes for use across the Fundraising Directorate, to effectively manage and monitor all Statutory Fundraising at the Charity.

	<ul style="list-style-type: none"> • Regularly horizon-scan for new Statutory Fundraising opportunities that match organisational priorities. • Contribute to a collaborative process of information-sharing between the Major Gifts team, the Regional Fundraising team, Policy and Service Development team and the senior management in the Support and Local Groups. • Identify, research and apply to Statutory fundraising programmes as appropriate. • Using research conducted; make full use of the team's contacts and networks wherever possible to ensure approaches for funding are made for the right topic and amount. • Work closely with operational teams to complete funding applications and reporting materials as appropriate. • Ensure that all 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. • Provide regular analyses of the progress and success of the portfolio, as well as maintaining financial monitoring and other administrative systems.
C.	<p>To develop and maintain a good understanding of all issues relating to Parkinson's and to remain informed on Parkinson's UK activities</p>
	<ul style="list-style-type: none"> • Build an understanding of Parkinson's, the treatments available and the advances made in the area of research. • Liaise with the Research 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. • 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.
D.	<p>To line manage a Trusts Officer</p>
	<ul style="list-style-type: none"> • Manage a Trusts Officer and develop an effective plan to realize their objectives as agreed and to mentor/coach them to be an effective member of the team • Monitor progress regularly through agreed 1-to-1 meetings ensuring objectives are uploaded to talent central and checked regularly throughout the year • Delegate work as appropriate to the Trusts Officer to ensure the departmental plan is delivered to the agreed timings and within agreed resources. • Work with the Trusts Officer to ensure all donor and prospect records are maintained and updated accurately and promptly and that record keeping is compliant with the charity's UK Data Protection Policy. • Help to ensure team members are aware of all relevant legislation and are kept up-to-date with developments at the charity as well as policy or procedural change. • Provide regular monitoring reports to the Senior Trust Manager on the performance of the Trusts Officer donor portfolio and any specific projects, ensuring effective financial control of all expenditure and the monitoring of income and taking corrective action as necessary.

	<ul style="list-style-type: none"> Identify and recommend any additional resources that are required to ensure effective implementation of the fundraising plan. Work with the Senior Trusts Manager to carry out any recruitment to the team that is agreed as a result of strategic planning, working within policy and procedures.
E.	To be a strategic theme lead on behalf of the Trusts Team , ensuring up to date information is shared and that the team are equipped to fundraise for organisational and strategic led priorities
	<ul style="list-style-type: none"> To assist the team so that they are equipped to fundraise for organisational and strategic led priorities To be a strategic theme lead on behalf of the Trusts Team and ensure up to date information is shared so that the Trusts and Statutory Team can play an effective part within the organization, and help realise fundraising objectives.
6.	General Responsibilities
	<ul style="list-style-type: none"> Contribute to team meetings, team and project working and implementing organisational priorities. Be flexible within the broad remit of the post. Take direction on projects and priorities from the Senior Trusts Manager, Head of Philanthropy and/or Director of Fundraising. Report monthly against agreed targets. Abide by the organisational policies and practices, including the equal opportunities policy and code of conduct. Be self-motivating and sufficient.
7.	Dimensions and Limits of Authority
Disciplinary action:	1 st level
Budgetary limits:	NA
Authorises expenditure within a budget to a limit of:	NA
Signs contracts and contractual matters on behalf of Parkinson's UK:	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.

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Person Specification**

		Essential	Desirable
Experience	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 personally securing gifts from Statutory/European funding sources or stewarding grants.	✓	
	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.		✓
	Experience of line management of trust and statutory fundraising staff		✓
Skills and Abilities	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.	✓	
Knowledge	A good understanding of the Trusts and statutory funding sectors and the fundraising mechanisms available for building long term relationships.		✓
	Excellent IT skills, including Microsoft Office, Outlook and databases.	✓	
Education/ Training	Educated to degree level or equivalent		✓
Other Requirements	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.	✓	