

Role Title (Internal HR use only): Senior Trusts Specialist (12 month fixed term contract)	Operational / external title: Senior Trusts Manager	Date: August 2019
Department: Fundraising	Team: Philanthropy and Partnerships (P&P)	Reports to: Head of Trusts and New Markets
Direct Reports: no	Indirect Reports: no	Dotted line reports: 0
Projected historical Grade/New Level: D	Budget Holder (yes /no): no	
Purpose of the Role:		
To co-lead on Foundation relationships in the UK and overseas, with a focus on new business. Developing an exciting programme of relationship building via networking, events and an increased presence, this role will build on a thriving Trusts programme by developing existing donors and prospects (predominantly trusts but with potential to also work with HNWI's) in the UK and Europe, plus seeking out new opportunities with a view to raising significant income for ActionAid's work with women and girls across the world.		
Areas of Activity	Key Accountabilities and Deliverables	
Donor relationships	<ul style="list-style-type: none"> • Research, cultivate and approach a portfolio of high-level trust prospects in the UK and Liechtenstein (predominantly those giving £100k+ per annum), working closely with the Prospect Research team to develop individual cultivation strategies for each trust to move them along the 'prospect pipeline'. • Account manage and steward a portfolio of around 3-4 existing high-level UK trusts & Foundations donors bringing in around £350k per year. • Raise awareness of ActionAid to inspire existing and prospective donors to engage with and support international development, campaigns and humanitarian work through proactive and extensive networking and by communicating AA's work persuasively through face-to-face meetings, presentations, phone calls, written communications and targeted funding applications. • Work with the Research and Project Information Team to identify matches between grant makers' funding priorities and AA's projects. • Draft tailored and targeted funding applications ensuring that funders' priorities are carefully balanced with AA's funding needs. • Continuously seek innovative and creative opportunities to deepen and broaden relationships with donors/prospective donors, trust staff and trustees through AA events or overseas trips to visit AA's work, and by strategically involving senior staff and country programme staff where appropriate. • Proactively identify and attend external meetings and seminars that are relevant to the team's work, and/or provide new networking opportunities, in order to develop connections with prospects, wealth advisors and other philanthropy experts as a means of identifying new prospects and 'door openers'. • Regularly monitor funding interests, income and expenditure trends, information about trustees, application procedures and any other relevant information. • Work with Principle Giving, MG and Corporate teams to identify links between their networks and your portfolio, to maximise new business opportunities. 	
Strategy	<ul style="list-style-type: none"> • In collaboration with the Head of Trusts and alongside the Senior UK Trusts Manager, co-lead the strategic development of the UK and Europe Trusts programme, creating and implementing an engaging strategic plan. • Keep up to date with trends in the global funding environment and specific trends in new business, European funding and Liechtenstein. • Monitor income in relation to targets and explain any variances in performance. 	
Grant and data management	<ul style="list-style-type: none"> • Working with the Project Information team, coordinate reporting on donor projects and other communications in a timely and engaging manner, and in accordance with the donors' reporting requirements, going the extra mile where possible to demonstrate excellent stewardship. • Working with the Project Information team, ensure good working knowledge of all existing grants. As required, liaise with country programme staff to monitor budgets and expenditure and report back to donors, ensuring their criteria are understood and implemented. 	

	<ul style="list-style-type: none"> • Maintain up-to-date records of all communications with trusts and foundations and enter all pertinent information on the Raisers Edge database and other systems in line with data protection legislation. • Ensure that donors are thanked promptly and appropriately as soon as grants are received and that all grant set-up procedures are followed, to support smooth project implementation.
Team work	<ul style="list-style-type: none"> • Play an active role within the Trusts team. Contribute to annual plans, attend regular team meetings and represent the team working collaboratively in cross-team working groups e.g. high value working group. • Drive continuous improvement in all aspects of team operations, with regular meetings to share information and discuss progress and initiatives, contribute ideas and share learnings within and across teams. • Build relationships and work collaboratively with colleagues in Major Gifts, Corporate Partnerships, Principal Giving, Research & Project information to drive P&P income growth and maximise opportunities. • Support the team to deliver our exciting annual programme of donor events to steward existing donors and attract new supporters – take responsibility for at least one event. • Work with the Head of Trusts and New Markets to ensure that AAUK’s CEO, SLT and senior programmes colleagues understand and are appropriately involved with Trusts and Foundations donor partnerships.
To be a key part of the Fundraising Department	<ul style="list-style-type: none"> • Engage with and demonstrate commitment to AAUK’s mission, vision, values and strategic aims, ensuring alignment with wider team’s vision, plans and objectives. • Support implementation of the Fundraising and Resource Mobilisation strategy. • Commit to taking a Digital first approach to fundraising ways of working (where possible, especially donor stewardship). • Ensure that all relevant supporter legislation is adhered to, referring to guidance from the Fundraising Regulator, Information Commissioner’s Office (ICO), General Data Protection Regulation (GDPR) and any other relevant codes of practice. • Proactively engage with the performance management system and take responsibility for seeking appropriate development opportunities including attending relevant organisational and external training courses.

Key Relationships (external to the team):	
<p>INTERNAL: Other P&P teams – especially Research and Project Information, Finance and Chard, Country Teams when necessary. Wider teams e.g. Comms, Digital, Media – where these support on partnerships.</p> <p>EXTERNAL: Trusts donors in the UK and Europe</p>	
EXPERIENCE, KNOWLEDGE & EXPERTISE	
<ul style="list-style-type: none"> • Essential: • Significant proven experience of building and maintaining relationships with Trusts and Foundations that has resulted in £100k+, multi-year gifts and an ability to hit financial targets. 	<p>Desirable:</p> <ul style="list-style-type: none"> • Knowledge of European markets or experience of successfully fundraising in a different market to the UK.

Capsule Role Profile

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| <ul style="list-style-type: none"> • Experience of successfully building rapport with individuals to develop relationships with donors, especially at a senior level. • Strong networking, negotiating, interpersonal and influencing skills and the ability to 'close the deal'. • Experience working collaboratively with senior internal stakeholders to cultivate donors. • A proven ability to articulate complex issues in a compelling and persuasive manner and to present a pitch with confidence, leading to relationships deepened and funds secured. • Polished writing skills, with a proven track record in producing high quality written materials and experience adapting writing style to a range of different communications. • Self-motivated with experience of working in a cooperative and flexible way as part of a busy team and working independently. • Entrepreneurial, innovative and ambitious with excellent attention to detail. • Confident IT skills to enable the production of visually appealing and professional Word, PowerPoint and Excel documents. • Commitment to AA's vision, mission and values, including a commitment to feminist principles and working in an organisation committed to working for the rights of women and girls. • Commitment to continually improving your digital skills and knowledge within the working environment. | <ul style="list-style-type: none"> • Understanding of the principles of other aspects of high value giving, for example High Net Worth Individuals and/or Corporates. • Knowledge and experience of proposal development and grant management (preferably in the international development/aid sector) • Demonstrable numerical and analytical skills and the ability to interpret the salient information from a financial budget • Understanding of Raiser's Edge or other CRM databases. • Experience supporting the delivery of high-quality events. • Experience working within the charity sector and ideally within Fundraising, Events or Communications. • An understanding of international development, women's rights and/or humanitarian work. • Ability and willingness to travel overseas and in the UK (a few times per year). |
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Any Other Relevant Information – please add in any information regarding the complexity of work undertaken / complexity of relationships; level to which they drive change in their role / team / department, whether within their core duties they undertake activities that potentially could be 'risky':

This is a new role developed to support the growth in Trusts team income at ActionAid. The role is a blend of account management and new business work, taking on an exciting pipeline and working collaboratively with existing team members.