



**Cranfield Trust  
Trust and Foundation Manager  
Recruitment Pack**

**May 2021**



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## Welcome to Candidates

### From Amanda Tincknell CBE, Chief Executive Officer



I hope you will be interested in joining our team at Cranfield Trust. The last year has been one of significant change, but some real positives have come out of our lockdown experience.

We've been able to reach more charities than ever before, thanks to the generosity of our volunteers, the commitment of our staff team and the technology that have enabled us to deliver webinars to over 3,000 delegates and continue delivering mentoring and consultancy assignments with over 500 charities.

We've helped our charity clients to adapt and survive in this difficult time, and are committed to doing all we can to sustain vital charity services as we come out of the pandemic. It's a busy and exciting time to join our team: we've got ideas and plans to take Cranfield Trust forward, building on our successful activities and continuing to innovate in the service of welfare charities across the UK. I am looking forward to welcoming new members to our team and discussing the role of Trusts and Foundations Manager with you.

### From Joanne Madders, Head of Development



Thank you for your interest in the role of Trust and Foundations Manager for Cranfield Trust. A unique aspect of the Trust's work is its 'multiplier value'. We are a relatively small team who make a BIG impact on the voluntary sector. In this role, you can help our charity achieve our goals – and help many more voluntary sector organisations to achieve theirs.

As Trust and Foundations Manager, you will have a real opportunity to shape and develop the way we work with trusts and foundations, develop substantial relationships with funders, and experience building varied and bespoke funding relationships. Cranfield Trust has an exciting range of strategic goals. I am looking forward to partnering with our Trusts and Foundations Manager to build a successful fundraising programme in support of Cranfield Trust and the entire UK voluntary sector.

**APPLICATION PACK FOR  
TRUSTS AND FOUNDATIONS MANAGER**

**Closing date: Friday 25 June 2021**

**Part-time, 4 days or 30 hours per week**

**Office-based (Romsey) or Home-based (South of England preferred)**

Flexibility with the location of this role may be considered for exceptional candidates.

**Salary: circa £33,000 per annum (pro-rata)**

**ABOUT CRANFIELD TRUST**

Cranfield Trust is the UK's leading provider of pro bono management support to the voluntary sector. An independent charity, focused on welfare causes, we have a 32-year track record of supporting UK-based charities and non-profit organisations. We work with our register of 1,400 highly skilled commercial sector volunteers and our funders and donors, to provide high value, independent services and advice to local and national charities across the UK.

We offer a range of management services to help build successful charities, including pro bono [Management Consultancy](#), [Mentoring](#) for charity Chief Executives and managers, Peer to Peer support groups, [Webinars](#)/masterclasses and [online resources](#) on a range of management topics. This year, we expect to start around 400 new consultancy and mentoring assignments, and in total, our services will reach around 4,000 charities.

Organised on a regional basis, our face-to-face services have transferred effectively to remote delivery during the Covid-19 pandemic, and our challenge for the next twelve months is to achieve a mix of delivery channels which provide charities with the most effective support.

The Trust's activity has grown, doubling in size over the last five years. The pandemic has been a period of innovation and rapid development as we have moved to start planned services quickly, to provide more support to charities and their leaders. At present (May 2021), our consultancy and mentoring assignments together are 40% ahead of expected levels.

We have not furloughed staff or downsized during the pandemic, and are moving back to a growth path in Spring 2021. We are ambitious in our plans, investing in our current services and developing new activities to meet the needs of the small to medium sized charities we serve.

**Our History**

The Trust was founded at the suggestion of HRH The Princess Royal on a visit to Cranfield University in 1988. At her challenge, staff, students and alumni of Cranfield University formed the Trust in 1989 to harness the skills developed at the university to benefit the voluntary sector. The Princess is our Patron, and we retain a strong, although independent, relationship with Cranfield University. We recruit volunteers through a range of contact networks including business school alumni groups and professional bodies.

## 2020-25 Strategy

Over the past five years, Cranfield Trust has more than doubled our size - in terms of the number of charities we support and in financial terms. We have a strong and growing reputation, and are respected for the high calibre of support we provide, thanks to our highly skilled staff team and the 1,400 volunteers who give their time to work with us.

Over the next five years, we will build on our strong foundations - excellent services, successful fundraising, strong volunteer recruitment and effective management - to provide vital services and support for organisations and leaders at a time when welfare charities have never been needed more.

We will:

- Further develop our successful Consultancy service for charities.
- Develop our Mentoring and Peer to Peer services, providing support for charity leaders.
- Develop a substantial learning centre, formalising our webinars into a programme covering charity management essentials and topical learning events.
- Leverage our experience in charity management to provide learning and insight, contributing to the wider voluntary sector, as well as informing our own development.

The Trust will also invest in technology to achieve economies in service delivery and management. We will work to ensure that our own organisation reflects the diversity of our society and develop our staff and volunteers so that the Trust is a great place to work, and an attractive volunteering option for commercial sector professionals.

Achieving Cranfield Trust's five-year strategy requires us to build our team and increase our fundraising activity. As an independent charity, we fundraise to meet 100% of our organisational expenditure. As well as fundraising for core support from funders and donors, we regularly work in partnership with national, regional and local funders to offer grant-funded programmes of support for their grantees and charities within their remit. Cranfield Trust has a strong history of fundraising and [working in partnership with trusts and foundations](#). Developing and growing our trusts and foundations work is a key organisational priority, alongside our other key fundraising objective, which is to further diversify our fundraising channels and portfolio.

*"Cranfield Trust provide the type of support which positively changes an organisation. It's more than training or consultancy that can be fleeting, it helps embed the change that the charity needs to help it help its beneficiaries."*

**Equal Arts in Newcastle**

*"Nick [our PM] has been brilliant, whoever works with him in the future will really benefit. Working with Cranfield Trust gave me the opportunity to have some 'critical friend' support in a formalised and agreed way which meant commitment and clear access from both sides, so I knew that I would access quality support rather than receiving support as a 'favour' from other contacts."*

**Weston Park Cancer Charity, Yorkshire + Humber**

## ABOUT THIS ROLE

We are looking for an experienced Trusts and Foundations Manager with proven written, research and relationship skills to excel as part of our small Development team. In this role, your remit will be to lead on stewarding and further developing our significant trusts and foundation portfolio. Reporting to the Head of Development and working alongside the CEO and other colleagues, you will manage and grow the portfolio in alignment with our fundraising strategy, initiate, develop and manage external and internal relationships, and secure income.

Your responsibilities will include:

- researching and identifying prospective funding bodies whose charitable objectives align with those of Cranfield Trust;
- producing high-quality grant applications and proposals for funders in support of fundraising targets.
- working independently to initiate and build sustainable relationships with new and existing donors.
- liaising and building relationships with colleagues internally in support of our fundraising work.
- reporting to funders on progress under grant relationships
- monitoring and reporting on trust and foundation fundraising activities to support internal discussions and planning.

The successful candidate will need to have the ability to research and identify new funders, independently build rapport with decision makers, and identify the right funding opportunities for Cranfield Trust and each prospective funder. You will possess strong writing skills to produce compelling, tailored funding proposals for a range of funding organisations, applying for core funding, restricted funding, and where appropriate, tailored programmes of work that support funders to achieve their goals of supporting grantees or other charitable organisations within their remit.

In addition to these strong writing and relationship building skills, to be successful in the role, you will need to possess analytical skills and be able to understand and interpret financial and statistical information. Strong time management skills are a must, as is a positive and friendly approach, proactive work ethic and a collaborative nature. A strong understanding of charitable trusts and foundations is essential, as is experience of working in a similar charity fundraising role.

We have ambitious plans to grow our income to ensure that we can support charities to adapt, survive and thrive following the Covid-19 pandemic.

If you are ready to help us meet the challenge, please do get in touch. The role will be based in our Head Office in Romsey. However, we are prepared to offer home-working with travel for meetings with funders and for internal meetings with your colleagues in Romsey as required.

We are committed to supporting you, your wellbeing and development, to ensure you enjoy working with us. We offer 25 days / 187.5 hours pro rata plus Bank Holidays, a pension scheme, and opportunities for training and personal development.

**Closing date: Friday 25 June 2021**

**First Round Interviews: w/c Monday 5 July 2021**

## Role Description

**Role:** Trusts and Foundations Manager (P/T - 4 days per week)

**Reports to:** Head of Development

### Main Purpose of Role

To raise funds and manage the Trust's relationships with trusts and foundations, supporting the work of the CEO and Head of Development.

### Key Objectives

- Raise funds from charitable trusts and foundations and other funding bodies in line with agreed targets.
- Research potential funding opportunities
- Independently develop, build and maintain new funding relationships
- Lead or support on applications as required.
- Steward funders and meet their reporting requirements on behalf of the Trust.

### Key Responsibilities

#### Research, Networking and Relationship Building

- Research prospective grant-making organisations and partners, using both external sources and internal knowledge generated by our wider team.
- Identify trust and foundation funding opportunities that support organisational fundraising and strategic goals; ascertaining relevant information required to make an application (e.g. eligibility).
- Discuss prospects and applications with Head of Development, advising on suitability and flagging where contacts may have considerable wealth or strategic influence either as individuals or as part of a corporate body.
- Identify the most appropriate individual contacts and methods for making approaches to funders in support of relationship building and fundraising;
- Independently make approaches to funders or provide advice to other colleagues making approaches as representatives of the Trust.
- Act as a representative for the Trust, being able to accurately and persuasively discuss the work and objectives of Cranfield Trust with prospective funders and partners.
- Keep aware of major developments in funding trends and new funding bodies and research potential opportunities as appropriate.

#### Fundraising

- Identify suitable funding proposals for potential funders and donors.
- Draft, finalise, submit and follow up applications and proposals for charitable trusts and foundations and other grant-making bodies.
- Liaise internally with colleagues about current funding proposals/applications as required to maximise the Trust's fundraising activities across its range of contacts
- Work with Head of Development, Finance and Operations team to identify accurate costs and full cost recovery across all of our grant applications.
- Achieve an agreed level of secured income

### **Stewardship and Relationship Management**

- Work with Head of Development to contribute to a comprehensive programme of stewardship for all Cranfield Trust supporters and funders, ensuring funders receive the appropriate level of communication, acknowledgement, recognition and feedback on the impact of their donation and in line with their requirements.
- Undertake grantmakers' required reporting and monitoring and/or delegate aspects of this to other colleagues as appropriate and required.
- Use Salesforce, create and maintain up-to-date trusts and foundations fundraising records and maintain outstanding donor management and record-keeping for trusts and statutory accounts.
- Develop and maintain good relationships with senior representative of charitable trusts and foundations to ensure likelihood of longer-term support, undertaking visits and external meetings as required.
- Proactively learn and stay up to date about the operations of the Trust, identifying issues of interest to particular funders
- Able to speak about our work to a reasonable level of detail with funders and other external contacts.
- Ensure all income is flagged to the Finance Team and banked and categorised in accordance with financial guidelines.
- Prepare progress reports on income generated, prospects and fundraising activity for Senior Management Team and Board of Trustees.

### **Team work**

- Be a leader within the team, contributing positively to good teamwork and upholding team values.
- Build and maintain excellent internal relationships with staff and volunteers within Cranfield Trust.
- As part of the Fundraising Team and organisation, help with major or special projects, as and when they arise.
- Share information and contacts with colleagues where helpful and appropriate.
- Support and attend events when required.
- Act as a representative and champion for Cranfield Trust at all times.

### **Training and Personal Development**

- Actively participate in the appraisal system
- Attend training programmes to assist in personal development.
- Where appropriate, participate in internal learning and development opportunities e.g. shadowing, masterclasses/webinars.

### **Other**

- Contribute to a safe working environment for self and others in accordance with relevant Trust policies and Health & Safety legislation.
- Share, process and retain information in accordance with relevant Trust policies and Data Protection legislation.



## Person Specification

<b>Knowledge and professional experience</b>	
Experience of writing high-quality applications to and reports for grant-making organisations.	Essential
Experience of meeting trust and foundation income targets for a charity.	Essential
Experience of researching appropriate grant-making organisations.	Essential
Experience of initiating, building and maintaining strong relationships with key individuals of trusts and foundations, such as grant managers, Trustees and administrators.	Essential
Experience of identifying, analysing and communicating appropriate information about charity services in order to source funding from trusts and foundations.	Essential
Experience of understanding and interpreting accounts to present financial information in written proposals.	Essential
Knowledge and experience of at least one other fundraising channel / discipline	Desirable
<b>Aptitude, Skills and Competencies</b>	
Research and analysis skills	Essential
Ability to work independently and manage a busy and varied workload	Essential
A highly organised approach to planning and recording communications with supporters and prospects	Essential
Excellent interpersonal social skills	Essential
A high standard of computer literacy	Essential
<b>Attitudes and Behaviours (including circumstances)</b>	
Flexibility to occasionally work unsociable hours or adjust working pattern	Desirable
Willingness to work positively in a team environment and with colleagues across the charity, to share leads and to uphold the charity's values	Essential
A genuine passion to see Cranfield Trust succeed in its objectives	Essential
<b>Other</b>	
Professional appearance and manner	Essential

## Summary of terms and conditions of employment

This is a part-time, permanent post.

**Salary:** C. £33,000 per annum pro rata, plus 2% employer pension contribution

**Location:** Office or Home based, with travel for business purposes and spend time with team members in the office as necessary.

**Hours of work:** The post holder will be employed part-time for 22.5 hours per week.

**Annual leave:** Annual entitlement of 33 days (on a pro rata basis for part-time staff) inclusive of Bank/Public Holidays. The office is closed during the Christmas break and annual leave must be taken during this time

**Probationary period:** There will be a three-month probationary period.

**Policies and procedures:** We have policies designed to ensure the safety and well-being of both workers and volunteers e.g. health and safety.

### How to apply for this role:

If you are interested in joining us, please send a CV and a cover letter, which should outline why the role is of interest to you and your suitability as a candidate for the role. Please send this by email to [recruitment@cranfieldtrust.org](mailto:recruitment@cranfieldtrust.org) no later than **Friday 25 June 2021 at 5pm**. For ease of reference, please write your name and the job role you are applying for in the subject line of your email.

First-round interviews are expected to take place the week commencing **Monday 5 July 2021**.

To discuss the post informally, please contact **Joanne Madders, Head of Development**, in the first instance on [recruitment@cranfieldtrust.org](mailto:recruitment@cranfieldtrust.org)

Cranfield Trust is an Equal Opportunities employer. This means that when carrying out our work and in the employment of staff to undertake this work, we will seek to ensure equality of treatment for all persons regardless of ethnicity, gender, age, marital status, disability, religion, sexual orientation, or economic status.

### Pre-employment checks:

We will require a minimum of two appropriate references and will check original documents proving your qualifications, identity, and right to live and work in the UK before you can start work with us. You will be asked to provide details of any unspent criminal convictions.

### References:

References should be your present and last employer. They should have had either managerial or supervisory responsibility for your work, and not be colleagues, subordinates or friends.

Referees will be provided with a copy of the job description and person specification for the vacancy. Cranfield Trust will only approach your referees once an offer of employment has been made.

### How we use your personal information:

The information which we gather from you during the recruitment and selection process is retained and processed in accordance with the provisions set out by the General Data Protection Regulation (EU) 2016/679 (GDPR) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK, as well as any successor legislation to the GDPR and Data Protection Act 1998.

Please note that by submitting an application for employment, you are also agreeing to the Cranfield Trust processing such information as may be necessary to assess your application, provided that proper regard is had to the data protection principles in force and in accordance with our Privacy Notice in respect of Employees, Workers and Contractors (see attached).

If your application is successful, the information you provide will be retained and will form part of your personnel file. If you are not offered work with the Cranfield Trust, all documentation related to your application will be confidentially destroyed after a period of six months.

## Equal Opportunities Monitoring Form

### PRIVATE AND CONFIDENTIAL

Cranfield Trust welcomes applications from all parts of the community. The Trust operates an Equal Opportunities Policy and no person will be discriminated against whilst seeking employment or during such employment with the Trust on the grounds of any protected characteristics such as age, disability, ethnic origin, gender, marital status, political allegiance, race, religious belief, sexual orientation, responsibility for dependants, or unrelated spent criminal convictions.

The following information will be kept strictly confidential and stored separately from the application form before short-listing takes place. It will not form any part of the recruitment process or decision to appoint and will be used to provide data for monitoring purposes only. You may choose to leave any or all questions unanswered.

POST APPLIED FOR:			
FULL NAME:			
AGE:		DATE OF BIRTH:	
GENDER (Please circle/cross out as appropriate):	MALE/FEMALE/ TRANSGENDER/ OTHER (Please specify) _____  _____	IS THIS THE SAME GENDER YOU WERE ASSIGNED AT BIRTH?	<input type="checkbox"/> Yes <input type="checkbox"/> No (please tick/double click to select)
MARITAL STATUS (Please circle/cross out as appropriate):	MARRIED/CIVIL PARTNERSHIP/SINGLE/DIVORCED/LIVING WITH PARTNER/OTHER		
DO YOU HAVE RESPONSIBILITY FOR DEPENDANTS (e.g. children, elderly, or any other person for whom you are the main carer)?	<input type="checkbox"/> CHILDREN <input type="checkbox"/> ELDERLY <input type="checkbox"/> OTHER <input type="checkbox"/> NOT APPLICABLE		
DISABILITY Do you consider yourself to have a physical and/or mental impairment as defined by the Equality Act 2010/ Disability Discrimination Act 1995 (NI)?	Yes <input type="checkbox"/> No <input type="checkbox"/> (please tick/double click to select)  Please give details if you wish:		
ETHNIC ORIGIN How would you describe your identity?	<b>WHITE:</b> <input type="checkbox"/> BRITISH <input type="checkbox"/> ENGLISH <input type="checkbox"/> IRISH <input type="checkbox"/> SCOTTISH <input type="checkbox"/> WELSH OTHER (PLEASE SPECIFY): _____		

	<p><b>CONTINUES ON NEXT PAGE</b></p> <p><b>MIXED:</b></p> <p><input type="checkbox"/> WHITE AND BLACK CARIBBEAN</p> <p><input type="checkbox"/> WHITE AND BLACK AFRICAN</p> <p><input type="checkbox"/> WHITE AND ASIAN</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p><b>ASIAN, ASIAN BRITISH, ASIAN ENGLISH, ASIAN SCOTTISH, ASIAN IRISH OR ASIAN WELSH</b> (Delete as applicable):</p> <p><input type="checkbox"/> INDIAN</p> <p><input type="checkbox"/> PAKISTANI</p> <p><input type="checkbox"/> BANGLADESHI</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p><b>BLACK, BLACK BRITISH, BLACK ENGLISH, BLACK SCOTTISH, BLACK IRISH, BLACK WELSH</b> (Delete as applicable):</p> <p><input type="checkbox"/> CARIBBEAN</p> <p><input type="checkbox"/> AFRICAN</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p><b>CHINESE, CHINESE BRITISH, CHINESE ENGLISH, CHINESE SCOTTISH, CHINESE IRISH, CHINESE WELSH</b> (Delete as applicable):</p> <p><input type="checkbox"/> CHINESE</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p><b>OTHER ETHNIC ORIGIN:</b> (PLEASE SPECIFY): _____</p>		
RELIGION/CULTURAL BACKGROUND	<p><input type="checkbox"/> NONE</p> <p><input type="checkbox"/> CHRISTIAN</p> <p><input type="checkbox"/> BUDDHIST</p> <p><input type="checkbox"/> HINDU</p> <p><input type="checkbox"/> JEWISH</p> <p><input type="checkbox"/> MUSLIM</p> <p><input type="checkbox"/> SIKH</p> <p>OTHER (PLEASE SPECIFY): _____</p>		
WHERE DID YOU SEE THIS POST ADVERTISED?			
SIGNATURE (not required)		DATE:	

**Thank you for taking the time to complete this form.**

**PLEASE RETURN COMPLETED EQUAL OPPORTUNITIES FORM TO:**

[recruitment@cranfieldtrust.org](mailto:recruitment@cranfieldtrust.org)