



*We believe in building successful charities.*

## **TRUSTS AND FOUNDATIONS MANAGER**

**Closing date: Friday 15 March 2019 by 1pm.**

**Application pack for Trust and Foundations Manager**

**Part-time, 3 days or 22.5 hours per week**

**Office-based (Romsey)**

**Salary: £32–35K per annum, pro rata**

Some flexibility with the location of this role might be considered for exceptional candidates.

### **About Cranfield Trust**

Cranfield Trust is a national charity (England & Wales 800072, Scotland SC040299) and the leading provider of free management support and business advice to the UK voluntary sector. The Trust's vision is that charities will be effectively managed and will support those experiencing poverty, disability and social exclusion. Our client charities are usually small to medium sized charities with incomes of less than £1 million per annum, which provide vital frontline services to their communities.

- Cranfield Trust uses a network of project managers and over 1000 highly skilled volunteer business professionals to deliver free consultancy projects for hundreds of small to medium-sized charities in eleven strategic regions of England, Wales and Scotland. The purpose of this is to support charities to manage themselves and provide their services effectively to their beneficiaries.
- The Trust also runs HRNet, a free HR lifeline to charities and social enterprises. It offers specific advice on complex employment situations without expense, as well as regular briefings on employment issues, an information archive, and model documents.
- And the Trust provides free Masterclasses for charity professionals and Trustees on topics as diverse as governance, change management, business planning and financial forecasting.

Last year, 100% of the charities using our consultancy services reported that they were better able to plan and prepare for the challenges ahead as a result of working with the Trust. Over 95% of these charities reported improvements in strategic direction, financial management and sustainability, people management and leadership - and 100% of charities would recommend the Trust's services to other charities. [You can read about some of these success stories on our website.](#)

In 2019, the Trust is celebrating its 30<sup>th</sup> anniversary as a charity. We are using our 30<sup>th</sup> anniversary year to help charities to be as prepared as possible for the political and economic challenges facing our sector. Our anniversary serves as an important milestone in our history. It also coincides with a period of great change for the Trust as we are in the first year of an ambitious three-year strategy to support more charities with the delivery of vital services.

Cranfield Trust's three-year strategy will enable us to help more charities in these and other ways by extending the reach of our existing consultancy and advice services. In addition, we will launch new services, for example, a mentoring programme for charity managers, and a telephone advice service to provide access to critical and timely advice from external advisers on key management topics.

## About this role

Cranfield Trust has a strong history of fundraising and income generation through its relationships with Trusts and Foundations. We have worked with many of our current funders for many years, and as a charity, we receive 'unrestricted' core funding, 'restricted' funding to support funders' grant holder charities, and regional or localised funding in support of our work in Scotland, Wales and the English regions.

As an organisation, we have an ambitious three-year strategy to support more charities to prepare and adapt during the current unprecedented era of adjustment for the voluntary sector. To achieve this, we need to grow our income by further developing our portfolio of grant makers, as well as, in parallel, developing other sustainable income streams.

We are looking for a talented Trusts and Foundations Fundraiser with the proven written, research and relationship skills to help us to manage our existing portfolio of funding relationships, develop and increase the trusts and foundations portfolio, and excel as part of our new Development team.

The right candidate will be skilled at writing high-quality applications to grant-giving organisations and will have demonstrated the ability to research and identify new funders and build rapport with decision makers. A strong understanding of charitable trusts and foundations is essential, as is experience of working in a similar charity fundraising role.

You will need to possess the skills to write compelling, tailored funding proposals for a range of funding organisations and be able to demonstrate the ability to understand and interpret financial and statistical information. Strong time management skills are a must, as is a positive and friendly approach, pro-active work ethic and a collaborative nature.

If you are ready to help us meet the challenge, please do get in touch. The role is based in our Romsey Head Office with occasional travel to meetings with funders.

We are committed to supporting you, your wellbeing and development, to ensure you enjoy working with us. We offer 33 days / 247.5 hours (inclusive of Bank Holidays) pro rata and a contributory pension scheme.

**Closing date: Friday 15 March 2019 by 1pm**

**Interview date: w/c 25 March 2019 (to be arranged)**

## Role Description

**Role:** Trusts and Foundations Manager (P/T)

**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 and support and lead on applications as required.
- Steward grant-makers and funders and meet their reporting requirements on behalf of the Trust.

### Key Responsibilities

#### Fundraising

- Identify suitable funding opportunities that support the development of organisational strategy and advise colleagues across the organisation.
- Develop relationships with potential funders, positioning the Trust as a partner in supporting the voluntary sector.
- Make applications to charitable trusts and foundations and other grant-making bodies for grants and donations to Cranfield Trust.
- Carry out an agreed number and value of applications.
- Match potential funders and donors with suitable projects.
- Liaise with all departments and staff as required to obtain information required for proposals.
- Work with the Finance team to identify accurate costs and full cost recovery for grant applications.
- Draft, liaise internally, finalise and submit proposals.
- Aim to achieve an agreed level of money received compared to money applied for.

#### Stewardship and relationship management

- Undertake required reporting and monitoring for grant givers as required.
- Using organisational database/CRM systems, create, maintain and administrate up-to-date trusts and foundations fundraising records, supporting outstanding donor management.
- Build relationships with Trustees of charitable trusts and foundations to ensure likelihood of longer-term support.
- Undertake visits and external meetings with Trustees and grant managers as required.
- Ensure all restricted income is flagged to the Finance Team and banked in accordance with financial guidelines.
- Ensure funders receive the appropriate level of acknowledgement, recognition and feedback on the impact of their donation and in line with their requirements.
- Develop and maintain good relations with potential and existing funders, including small trust donors.

- Ensure that all funders receive timely and relevant correspondence and updates about the work of the charity.
- Proactively seek out opportunities to inform and share information with funders and prospects, where the Trust can offer insights or a unique view on voluntary sector issues.

### **Research**

- Research prospective grant making supporters/family foundations.
- Keep aware of major developments in funding trends and new funding bodies and research potential opportunities as appropriate.
- Conduct research into grant-makers to ascertain relevant information required to carry out applications.
- Refer to Head of Development when contacts may have considerable wealth or influence either as individuals or as part of a group or corporate body.

### **Team work**

- Maintain excellent internal relationships with staff and volunteers within Cranfield Trust.
- Work as a part of the Fundraising Team and organisation, helping with major projects, as and when they arise, sharing information and contacts with colleagues.
- Support and attend events when appropriate.
- Represent positively the work of Cranfield Trust.
- Contribute positively to good teamwork and uphold team values.
- Act as an ambassador for Cranfield Trust and attend and support events for fundraising as required

### **Training and Personal Development**

- Actively participate in appraisal system and attend training programmes to assist in personal development.
- Participate in Shadowing and other learning opportunities across different Cranfield Trust teams.

## Person Specification

<b>Education, qualifications and training</b>	
Educated to degree level or equivalent	Desirable
<b>Knowledge and professional experience</b>	
Experience of writing high-quality applications to grant-giving organisations.	Essential
Experience of meeting trusts and foundations income targets for a charity.	Essential
Experience of researching appropriate grant-giving organisations.	Essential
Experience of building and maintaining strong relationships with key individuals of trusts and foundations, such as grant managers, Trustees and administrators.	Essential
Experience of collating 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
Experience of using a CRM system to manage relationships .	Desirable
<b>Aptitude, Skills and Competencies</b>	
Ability to research and identify suitable trusts, foundations and other grant-giving bodies	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, share leads and 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:** TBC plus 2% employer pension contribution (rising to 3% from 1 April 2019).

**Location:** Office-based, with travel to meet client charities, volunteers and other meetings 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 / 247.5 hours (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 six-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.

## Recruitment and Selection Process

The Cranfield 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, covering at least 3 years of prior employment. We 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:

Referees 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. Where appropriate, a tutor's reference and a personal reference or similar will be acceptable.

Referees will be provided with a copy of the job description and person specification for the vacancy. The 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.

### How to apply:

If you are interested in joining us, please send a CV and a cover letter, which will explain why the role is of interest to you and your suitability as a candidate for the role. Please send this by email to [Karen.Hurley@cranfieldtrust.org](mailto:Karen.Hurley@cranfieldtrust.org) no later than **Friday 15 March 2019 by 1pm**.

First-round interviews are expected to take place in the week commencing **Monday 25 March 2019**.

To discuss the post informally, please contact **Joanne Madders on 01794 830338** or [joanne.madders@cranfieldtrust.org](mailto:joanne.madders@cranfieldtrust.org)

## 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): _____  <b>MIXED:</b> <input type="checkbox"/> WHITE AND BLACK CARIBBEAN <input type="checkbox"/> WHITE AND BLACK AFRICAN <input type="checkbox"/> WHITE AND ASIAN OTHER (PLEASE SPECIFY): _____		

	<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:		DATE:	

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

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

**Post:**

Karen Hurley, Cranfield Trust, Court Chambers, 1 Bell Street, Romsey, Hampshire, SO51 8GY.

**Email:**

[karen.hurley@cranfieldtrust.org](mailto:karen.hurley@cranfieldtrust.org)