



## Job Description & Person Specification

Job Title	Trust & Foundations Officer
Department	Marketing, Communications & Fundraising
Cost Code	9600
Location	Hatfield central office / Hybrid / homebased / you will be required to travel to attend some meetings, team days and events, so you must reside in the UK and be comfortable/willing to travel across Herts, Beds, Bucks and London
Reporting to	Fundraising & Corporate Partnerships Manager
Contract type	Permanent
Grade	6
Vetting	Basic DBS
Travel	As per Location

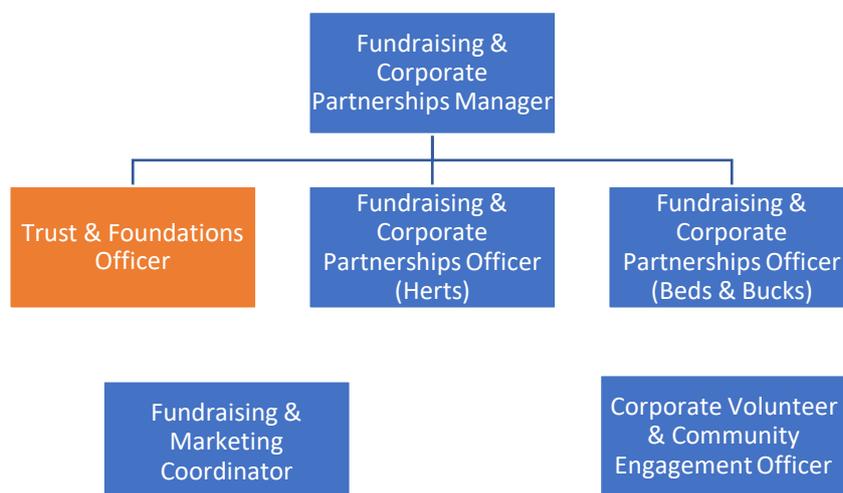
### Main purpose of role

One YMCA provides a range of social housing, health & wellbeing, family and children's services, youth and community activities within Hertfordshire, Bedfordshire and Buckinghamshire for the benefit of local people and communities. With a turnover exceeding £20 million and over 450 staff, One YMCA is committed to making a difference in the local area through the services it delivers and the partner organisations it works with.

This new sub-division (manager and five team members) will join the existing marketing, communications, and fundraising team in identifying and building relationships to raise vital funds for the organisation.

The team will engage existing supporters and identify and cultivate new relationships across all fundraising income streams, including but not limited to; corporate sponsorship and regular giving, individual giving, fundraising challenge events, trusts and foundations, and major donors. This role will be instrumental in driving forward the approach and stewardship programme for donors, enabling the team to fill the funding gap to continue the organisation's work in supporting 120,000-150,000 people across Herts, Beds and Bucks.

## Where your role fits in the team



## Role specific responsibilities

The key elements of the post are to:

- Be responsible for Trust and Grant Fundraising Income targets.
- Develop and maintain potential and actual funding relationships with trusts & foundations.
- Research, identify, produce and submit high quality bids. Co-ordinate grant monitoring including making claims and providing feedback reports.
- Develop financial and descriptive collateral for use in bids.
- Attend networking events and meetings to proactively and deliberately identify leads and cultivate relationships.
- Manage a portfolio of existing, and potential trust & foundation funders, across a multi-faceted income generating stream, to provide exceptional supporter care and delivery of successful partnerships.
- Work with the MCF team to create, plan, promote and attend fundraising challenge events, including a volunteer support crew.
- Work with Manager and the marketing division to maximise reach and engagement and revenue generation on all fundraising campaigns and events.
- Work as a team towards and achieve the agreed Key Performance Indicators and performance objectives, including a current team target of circa £1.5m unrestricted income

- Ensure a high level of service is always provided, assuring an unbeatable and magnetic force of attraction.
- Work with Governance, Risk and Compliance Team, to ensure our charity complies with all relevant legislation, including GDPR.

## General responsibilities

### Strategic matters/Development activities:

- Develop sufficient knowledge and understanding of the charity's work, values and ethos so as to be able to support its communications, particularly to trust & foundation, donor and general public audiences.
- Manage relationships with supporters, stewarding them where possible to become long-term supporters of One YMCA.
- Support in the development of the fundraising strategy, budget and operational plans as part of the organisation's business planning process.
- Work with the team to develop and implement an annual engagement programme to maximise income from all existing and potential sources.

### Operational management/service delivery:

- To take an active role in the networking activity of One YMCA in order to secure new donors/sponsors and facilitate new partnership.
- Work closely with manager, to improve the supporter journey, developing leads from first contact with YMCA, through to sustained involvement and regular giving.
- Work closely with colleagues to identify and define potential new organisation projects suitable for fundraising, in line with agreed strategy.
- Work in partnership across the team to package and present projects in a way that will optimise sponsorship and funding opportunities.
- Work with the team to maintain an information bank of projects available for fundraising including budgets, project outlines and timescales.
- Encourage, support and manage "everyone is a fundraiser" approach across the organisation.

### Statutory and Regulatory:

- To ensure that YMCA remains fully compliant with all relevant legislation and best practice in terms of its fundraising activity.
- To work within agreed budget and to comply with financial regulations and all other YMCA Policies and Procedures.
- To work with others to ensure YMCA remains compliant with all relevant best practice and legislation, including GDPR and the Fundraising Regulator standard.
- To be responsible for information held on internal database systems (Salesforce) in line with statutory obligations and legislation.

### Budgets and administration

- To ensure all fundraising expenditure allocated for organised trusts & foundations events is within budget, income, and surplus targets are achieved.
- Ensure that all activities are as cost effective as possible, monitoring expenditure to ensure the best possible ROI and surplus.
- Manage a dynamic workload and respond to competing priorities.
- To maintain an internal database (Salesforce) to accurately track fundraising and donor engagement, consciously and enthusiastically creating a culture of involvement and ownership across the entire supporter base.
- Produce post-event evaluations and future recommendations for all activities/events.
- To acknowledge all donations and to provide suitable feedback to preserve and enhance the relationship between YMCA and the donor/supporter.
- To use Excel to prepare draft costings, budgets and other financial reports as required for sponsorship, applications, and events.
- To work with the team to maintain a stock of up-to-date documents and policies that are routinely required for grant applications such as equal opportunities, accounts, memorandum of articles, outline of activities, demographic information, etc.
- To be able to plan and manage a complex workload and set of activities effectively with the ability to adapt to unscheduled and changing demands therefore, re-prioritising when necessary.
- To be fully flexible with working hours and task scheduling to ensure maximised access and engagement with opportunities and events.
- To be responsible for communicating relevant information about successful applications so that the finance department can track payments, classify expenditure and income accurately and appropriately and manage cash flow.
- Provide regular activity and income updates to manager as applicable.

#### Working relationships

- Work across the department collaboratively with fundraising & marketing team and operational colleagues to ensure the successful organising of high impact applications
- To work with manager and, internal marketing and communication colleagues to develop suitable periodic promotional communication for donors, supporters, and staff to sustain engagement with YMCA and its activities such as promotional material, call to action case studies and social impact reports.
- To work closely with and report to manager to achieve set activities and objectives.
- To work with colleagues to apply for appropriate funding streams.
- To build strong relationships with trusts and foundations to encourage continued growth in community and church support for YMCA work.
- To work with members of the Board and other relevant people to extend YMCA's contacts and its impact and profile within the local community in such a way as to complement YMCA's charitable work in the community.

- To liaise with the specialist national fundraising staff at YMCA England and Wales to make use of their expertise and resources as appropriate in order to further our local fundraising strategy.
- To play an ambassadorial role across the wider Federation by representing One YMCA at relevant national forums and events.

#### Performance Management and Learning and development

- Learning and development opportunities will be identified and agreed between postholder and line manager to assist the postholder's delivery of the activities and objectives required.

#### General

- Achieve objectives set by line manager.
- To support the manager in delivery of the charity's strategic plan and activities.
- To liaise with internal staff across all service areas concerning trusts & foundations, supporter and donor networks and account management.
- To be responsible for the maintenance of accurate computerised records of all owned activities and stakeholder details to ensure efficient and effective stewardship and cross-departmental working.
- To keep up to date with market trends and developments in trusts & foundations fundraising.
- To promote the work of the Charity generally to trusts & foundations and individual donors, for example, participation in events, campaigns, networking, meetings and activities.
- To work in a way that reflects and supports the Charity's values.

### Core Competencies / Job Family

- Successful experience in writing bids and applications for fundraising purposes
- High attention to detail with strong, written communication skills.
- Ability to research and gather information and data when needed.
- Experience preparing financial breakdowns.
- Ability to cultivate relationships with all stakeholders and funders.
- Demonstrating knowledge of your role and the work of the organisation and to enable innovation and change through the involvement of others.
- Infectiously enthusiastic influencer with highly developed and proven interpersonal and communication skills.
- Meeting stakeholder needs and being able to continually improve our services to make sure they receive an excellent service.
- Behaving ethically and professionally with role and taking steps to learn and develop over the course of employment and achieving high levels of performance in self and others.
- Making sure that the YMCA delivers its priorities, manages relationships, and risks as well as using resources appropriately to deliver success.
- Working effectively with others, opening and collaboratively, valuing their differences and creating a working environment which helps achieve goals.

## Person Specification

Knowledge, qualifications and experience	Essential	Desirable
Self-starter and uniquely resourceful	√	
Experience of writing applications to trusts & foundations	√	
Understanding of fundraising regulations and charity sector operating policies and approaches	√	
Driving licence and access to suitable vehicle	√	
Strong financial acumen and understanding, with ability to effectively manage revenue and costs at project level	√	
Experience of meeting (and exceeding) targets/objectives	√	
<b>Aptitudes, skills and competencies</b>		
Enthusiastic vibrant personality	√	
Confident and engaging public speaker		√
Excellent written and verbal communication skills	√	
Energised by the achievement of delivering a team win	√	
Personal sense of reward in supporting others to achieve beyond their (perceived) current limits	√	
<b>Personal qualities</b>		
Commitment to valuing equality and diversity and understanding how this applies to own area of work/service provision	√	
Commitment to own professional development and willingness to undertake learning and development appropriate to the role	√	
Able to respect the Christian ethos of the YMCA and uphold its values	√	
Ability to work flexibly with occasional out of hours activities	√	
Ability to travel across organisational sites on a regular basis	√	