

Role profile

Role title: Trust Officer		Reports to: Head of Trusts & Major Gifts
Department: Fundraising & Supporter Services		Band: B
Purpose of role: Develop, implement and promote fundraising strategies and programmes to maximise income from Trusts.		
Dimension:	Required to do:	Requires ability to:
<i>Developing solutions</i>	<ul style="list-style-type: none"> • Manage and refine the ongoing mailing programme to small Trusts (under £5K) to achieve the budgeted target • Develop and manage the large Trust application programme (£5K plus) to achieve the budgeted target • Conduct research to determine the appropriate trusts to approach for funding • Develop tailored donor development plans and applications for Trusts and manage associated cultivation events/communications • Identify CPRE projects suitable for trust funding and develop compelling cases for support to motivate prospective Trusts to provide financial support. Implement a rolling programme of submissions to Trusts for both core and project grants • Develop funding strategies and proposals linked to the priorities, interests and concerns of the trust 	<ul style="list-style-type: none"> • Think both strategically and analytically • Give attention to detail • Keep abreast of changes to funding guidelines and data on trusts • Maintain information on trusts • Analyse data
<i>Decision-making</i>	<ul style="list-style-type: none"> • Make decisions concerning suitable projects to propose when developing bids for financial support • Take decisions over the medium to long term that could impact directly on the overall reputation of CPRE, have implications for financial targets and damage the long term relationship with the trust concerned • Assess and seek to minimise the risks and maximise the likelihood of securing funding 	<ul style="list-style-type: none"> • Demonstrate creativity and innovation • Scenario plan • Assess risk • Respond to changing circumstances and know when to refer decisions
<i>Planning and delivery</i>	<ul style="list-style-type: none"> • Plan and project manage work for self in accordance with agreed objectives • Monitor and review progress revising and updating plans to ensure delivery • Prioritise own workload both day to day and over the short to medium term 	<ul style="list-style-type: none"> • Monitor actual against forecast income and take appropriate action • Manage multiple priorities and time appropriately • Ensure database is accurate and up to date
<i>Communications</i>	<ul style="list-style-type: none"> • Build and implement effective cultivation and stewardship plans for developing and maintaining relationships with Trusts to secure and maintain long-term funding 	<ul style="list-style-type: none"> • Influence and cultivate • Apply strong written and oral communication, presentation and influencing skills

	<ul style="list-style-type: none"> • Present CPRE and its work to external audiences in an engaging and inspiring way to secure funding • Develop relationships with high net worth individuals, particularly where the funding relationship is through their Trust • Report on income generated internally • Develop a compelling case for support • Complete trust applications to fit their funding objectives and requirements • Work with members of the Policy Team to develop funding proposals from future project plans • Devise and deliver the trust communication programme 	<ul style="list-style-type: none"> • Adapt sophisticated messages for different audiences • Develop rapport and manage relationships with care and professionalism
<i>Working relationships</i>	<p>Support other Major Gifts team members as and when required in their focus areas</p> <p>Works with: Various Heads of Team and Directors as appropriate. Deputy CEO, Finance team, Communications team, Individual Giving team, Supporters, Branches, and external agencies.</p>	<ul style="list-style-type: none"> • Work collaboratively with others across the organisation • Offer support to Branches
<i>Developing people</i>	<ul style="list-style-type: none"> • No formal responsibility for other staff • Will manage volunteers • Contributes to project teams established to develop projects for funding 	<ul style="list-style-type: none"> • Provide informal support and guidance to other members of the team
Knowledge, skills and expertise		
Technical, specialist or professional <ul style="list-style-type: none"> • Minimum of 2 years' experience of gaining funds from charitable Trusts • Track record of writing detailed reports and applications • Understanding donor motivation and fundraising techniques to maximise donor loyalty and giving • Understanding the types of project suitable for trust funding • Microsoft office • Experience of working with a fundraising database, (ours is currently ThankQ) 		Organisational skills <ul style="list-style-type: none"> • Proven experience of project management across functional boundaries • A track record of working collaboratively