

THE POST

Service:	Global Engagement and Development http://www.exeter.ac.uk/departments/ged/
Post:	Trusts and Foundations Manager
Reference No:	P00790
Grade:	F
Reporting To:	Senior Principal Gifts Manager (Medical)

Job Description

Ranked among the top 100 universities in the world, the University of Exeter is investing in a new directorate of Global Engagement and Development (c. 50 staff) to enhance and sustain its international partnership and fundraising ambitions. With the implementation of a new International Strategy (2015-2020), the University is in the quiet phase of its most ambitious ever fundraising campaign, 'The University of Exeter: making the exceptional happen', which aims to raise £60 million of new philanthropic funds and leverage a further £100 million from this by 2020.

It is anticipated that 35% of Exeter's philanthropic campaign income will be secured from trusts; therefore as we approach the public launch of the campaign, the Global Engagement and Development (GED) directorate is committed to building on our resource in this area. The Trusts and Foundations Manager will play an integral part in realising the ambitions of Exeter's campaign.

Main purpose of the job

The Trusts and Foundations Manager will be responsible for securing significant new funds, with responsibility for implementing the trust and foundation strategy and the associated annual programme of proposals. The roleholder will also support GED colleagues in managing relationships and preparing proposals, and develop collaborative working relationships with members of other professional services, academic colleges and lay leaders. The nature of the job necessitates a level of independent action and decision making, working with the Senior Principal Gifts Manager and the Trust and Proposal Writer to ensure that opportunities to engage with and raise funds from trusts and foundations are maximised.

Objectives of the Role

1. Establish the University-wide strategic context for fundraising from UK and international trusts and foundations.
 - a. Maintain an overview of existing and past support from, and relationships with, charitable trusts and foundations across the University, working in partnership with the Trust and Proposal Writer.
 - b. Research and maintain an overview of giving trends amongst UK and international trusts and foundations.
 - c. Research higher education and voluntary sector activity and identify and implement best practice, keeping the trust and foundation strategy up to date.
 - d. Identify the scope for funding from UK and international trusts and foundations, informing targets for recommendation to the Senior Principal Gifts Manager and the senior GED team.
 - e. Provide recommendations relevant to maximising income opportunities, considering and exceeding current best practice, and oversee implementation of the trust and foundation strategy.
 - f. Working with the Senior Principal Gifts Manager, secure 'buy in' across the University, particularly at a senior level, by developing plans in a consultative way and identifying recommendations for delivery which maximise philanthropic income.
2. Maximise income from UK and international trusts and foundations.
 - a. Manage a caseload of major trust and foundation relationships and work proactively to achieve agreed annual income targets.
 - b. Support principal gift trust relationships (£500k plus) through drafting proposals, overseeing liaison and helping to develop strategic approaches.
 - c. Work with the GED Research team and the Trust & Proposal Writer to ensure an ongoing programme of research to identify funding opportunities and links between University of Exeter alumni, staff and stakeholders with trusts and foundations, including uncovering paths to new prospects.
 - d. Source and maintain information about relevant University projects, drawing on colleagues within GED, other professional services including the Research directorate and academic colleges.
 - e. Promote a 'relationship' approach to trust and foundation fundraising, using networks and personal knowledge to maximise funding opportunities.
 - f. Establish and maintain a timetable of bid submissions across the year, working in partnership with the Trust & Proposal Writer.
 - g. Ensure that appropriate cultivation/stewardship plans are in place for key trusts and foundations.
 - h. Provide trust and foundation related reports as required by senior GED colleagues.
 - i. Work in a collaborative and consultative way which builds relationships across the University and delivers benefits at all levels.
3. Manage trust and foundation activities within GED.
 - a. Project manage and support trust and foundation activities of colleagues within GED and in academic colleges.
 - b. Coordinate and drive delivery of principal gift (£500k+) level donations from trusts, working with senior GED colleagues.
4. Maintain an overview of University-wide resourcing to ensure that the University is able to cultivate the maximum number of trust relationships and submit the maximum number of high-quality bids.
 - a. Coordinate University-wide activity on collaborative proposals involving, for example, Research directorate staff and academics.
 - b. Ensure that events involving trusts and foundations are delivered to a high standard.
 - c. Provide reports and information to senior University staff in order to maintain and support, where appropriate, their involvement in key trust and foundation relationships.

5. Work with the GED senior team guided by the Senior Principal Gifts Manager to support the development and implementation of the campaign strategy. This will include:
 - a. Advising on the potential for income from trusts and foundations and timescales for cultivation/solicitation.
 - b. Advising on major areas of interest for trusts and foundations and helping to identify priority projects.
 - c. Helping to establish relationships with relevant University academic staff members and secure their support and involvement.
 - d. Work with Campaign Board members on approaches to funders.
6. Contribute to the annual planning process within GED and income target/KPI monitoring.
7. Deliver specific projects as required by the Senior Principal Gifts Manager, Associate Director and Director of GED.

Person Specification

The role of Trusts and Foundations Manager is complex. It requires professional knowledge, a thorough understanding of the University and the higher education sector and an ability to understand complex projects and produce compelling funding proposals. The individual must have a passion for relationship building and fundraising and understand the role it plays within higher education. To succeed in the role s/he will be required to demonstrate leadership skills, take initiative, think creatively, show commitment and enthusiasm, be strongly self-motivated, customer focused, target orientated and possess well-developed interpersonal skills.

The postholder would be expected to have:

Competency	Essential	Desirable
Attainments/qualifications	A strong educational background (minimum degree or equivalent qualification)	Post-graduate qualification
Skills and understanding	High level written and communication skills and outstanding editorial skills, plus demonstrated attention to detail Ability to work with academic colleagues to develop new projects to maximise funding opportunities Effective communication, networking and negotiation skills involving decision-makers both internally and externally Ability to compile information from a variety of sources and present it as a coherent and compelling funding application Social skills appropriate to representing the University to national and international figures of influence and affluence	Understanding of the University of Exeter's recent trajectory and research strength An understanding of what makes a bid/proposal compelling and how to deliver this
Prior experience	Demonstrable experience of drafting successful applications/proposals to gain financial support Sufficient knowledge, experience and skills in IT, including Microsoft Office applications, databases; and e-mail systems in order to be	Experience in a higher education or voluntary sector environment Experience of managing events/visits for high level delegations

	<p>administratively self sufficient</p> <p>Experience of managing and coordinating activities across departmental boundaries</p> <p>Significant experience of working with colleagues in delivering funding opportunities</p>	
Behavioural characteristics	<p>A passion for relationship management and fundraising and for higher education</p> <p>Ability to juggle multiple, competing priorities at any given time</p>	<p>A team player, who can work well on her/his own, or on behalf of the team</p> <p>Ability to use initiative to determine sources of information to inform proposals and bids</p>
Circumstances	<p>Flexibility with respect to variable working hours, including availability to travel throughout the UK and coordinate colleagues' activities overseas</p> <p>The Trusts and Foundations Manager may be required to attend University functions and events on and off campus and to work out of normal office hours as the role demands.</p> <p>S/he may be asked to undertake other duties commensurate with his/her grade.</p>	

Additional Information Relating to the Post

Salary

Salary will be circa £33,943 per annum subject to knowledge, skills and experience.

An increment will be payable on 1 August each year until the top of the scale is reached (subject to being in post for 6 months and satisfactory performance). The scale will be subject to a cost of living review each year.

Hours of work

Hours of work will be 36.5 hours per week (full-time) but staff at this level may be required to work additional hours to meet the requirements of the role.

Annual Leave

The annual leave entitlement for full-time appointments is 41 days per calendar year (pro rata for part-time appointments). For further information see our website <http://www.admin.ex.ac.uk/personnel/leave.shtml>.

Probationary Period

The appointment will normally be subject to a probationary period of one year.

References & Medical Clearance

All appointments are subject to satisfactory reference and medical checks and individuals will be required to complete a medical assessment form before appointment is confirmed. Applicants should note that the University normally contacts referees for short-listed applicants without further advice to applicants. When advising of referees, if they are resident overseas, please ensure you supply fax numbers and/or email addresses enabling us to contact them (if necessary) without delay.

Right to Work in the United Kingdom

We welcome all applicants and the diversity they bring. However, the nature of this role, the salary and the qualifications required, mean that immigration legislation will not allow the University to apply for a sponsorship certificate for this post. We strongly recommend that applicants that are non EEA nationals consult the Right to Work rules on the Home Office website at: www.ukba.homeoffice.gov.uk.

In particular you are encouraged to undertake a self assessment of your eligibility to work in the UK using the link to www.ukba.homeoffice.gov.uk/pointscalculator.

Terms & Conditions

The Terms and Conditions of Employment can be viewed on line by visiting <http://www.exeter.ac.uk/staff/employment/conditions/terms/>

Pensions

Membership of the Universities' Superannuation Scheme (USS) is automatic provided that you meet the qualifying criteria for membership. For details on the scheme please go to the <https://forthefuture.uss.co.uk>. Staff automatically become members and employee contributions will be taken from your pay unless you opt out in accordance with the current rules of the scheme. More information about the USS scheme can be found at www.uss.co.uk/members. The University, as your employer, contributes such sums as will be required to maintain the full benefits of the scheme. You may opt out of the scheme and if you wish to do so, you should contact the Pensions and Reward Advisor, Mrs Alison Rose (01392 723088/email a.j.rose@exeter.ac.uk) for further information.

Relocation

You may be able to claim relocation expenses in accordance with the University's Relocation Assistance Scheme. The maximum allowance that you can reclaim under the Relocation Assistance Scheme, if eligible, is 10% of salary.

Short-listing Information

We will acknowledge your application by email. The University of Exeter recognises the time and effort taken to apply for a position and will contact you by email to inform you of results of shortlisting

Application Procedure and Interview Information

The closing date for completed applications is **14th December 2016.**

Data Protection Act (1998)

The information contained within your application is being requested to enable the University to make employment decisions and meet statutory obligations. Any information provided to the University in this context will be treated confidentially and used only by manager(s), member of the University, Human Resources, Superannuation and Payroll during the course of your employment. Where the application relates to a post which is externally funded this information may be passed onto the relevant funding body.