

THE POST

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| College/Service: | Global Advancement |
| Post: | Senior Trusts and Foundations Manager |
| Reference No: | P63712 |
| Grade: | G |
| Reporting To: | Head of Development (Medical School) |

The University of Exeter is ranked among the top 1% of universities in the world. A member of the prestigious Russell Group, comprising the leading research-intensive universities in the UK, it is recognised for the high quality of its research and was recently awarded Gold in the Teaching Excellence Framework (TEF). In February 2017, the University launched publically its most ambitious fundraising Campaign to date, '[Making the Exceptional Happen](#)', aiming to secure £60 million of new philanthropic funds, as well as securing 60,000 volunteer hours by 2020. Having secured 75% of our financial target, and 104% of our volunteering target, an exciting opportunity exists for an experienced and resilient individual to play a crucial role in the closing stages of the delivery of the Campaign.

Job Description

Main purpose of the job:

The post-holder will identify funding opportunities and plan, develop and produce fundraising proposals to trusts, foundations and individuals of a consistently high quality. These bids will be tailored to the needs of a wide range of funders and donors based both in the UK and internationally. The post-holder will influence and implement the Trust and Foundation fundraising strategy. S/He will have direct, individual responsibility for securing significant new funds to support Campaign objectives and targets. The Senior Trusts and Foundations Manager will also collaborate with colleagues in the Global Advancement (GA) directorate to create fundraising project summaries and funding proposals for internal and external audiences, working with colleagues across the University to develop materials complementary to the Campaign case for support. This work will focus particularly on major proposals for gifts of £100k or more.

Main duties and accountabilities:

1. Cultivate and lead relationships with a high volume of trust/foundation funders in the UK, the US and elsewhere with the capacity and inclination to support the University. Draft proposals and secure gifts from these funders.
 - a. Manage a portfolio of trust relationships and work to agreed annual KPIs including individual income targets (typically £1.5m) and number of applications submitted.
 - b. Support mid-level major gift (£50k plus) and lead principal gift-level (£500k plus) trust applications through writing and editing selected proposals.
 - c. Maintain an institution-wide overview of existing charitable trusts and grant givers, who are donors to the University, to ensure that opportunities to secure continued funding are maximised.
2. Work in partnership with colleagues in the Trusts and Foundations team and the GA research team to ensure an ongoing programme of research and cultivation. Identify funding opportunities and links between University of Exeter alumni, staff and stakeholders with trusts and grant making organisations in

the assigned range, including uncovering connections to key staff members and trustees of these organisations.

- a. Develop a comprehensive understanding of trust giving across the UK university sector.
 - b. Source and maintain information about relevant University projects for the assigned/expected prospect pool, including fundraising Campaign priority projects, drawing on support from colleagues within and outside of GA.
 - c. In partnership with colleagues, establish and maintain a timetable of proposal submissions across the year.
 - d. Provide trust and foundation related reports focussing on the relevant prospect grouping for the role, working with senior colleagues, as required.
3. Ensure that appropriate donor stewardship plans are in place for key trusts and trustees.
- a. Lead on and contribute to timely and accurate written communications for donors, working with the Donor Relations Manager and other colleagues.
 - b. Ensure that key relationships and milestones are mapped and recorded on the Raiser's Edge database.
 - c. Ensure the sustained high quality of events and campus visits involving trusts and grant making organisations.
4. Provide a support role to the Director of Global Advancement and the Head of Philanthropy by delivering professionally-written philanthropic funding proposals that are co-ordinated effectively.
- a. Work in partnership with the GA leadership team and Senior Development Managers to ensure that the most compelling proposals are in place.
 - b. Devise templates and implement best practice for proposals for individuals and trusts/foundations.
 - c. Ensure that stock proposals for Campaign priority areas flowing from the Campaign case for support are regularly updated and amended to reflect evolving university priorities, working in partnership with the GA Communications Manager.
 - d. Create and maintain an electronic library of proposals.
 - e. Develop an in-depth understanding of the giving different mechanisms (e.g. current use gifts and endowments) available to individual and organisational donors, to inform the preparation of varied proposals.
 - f. Work in a collaborative and consultative way which builds relationships across the University and delivers benefits at all levels.
5. Contribute to the annual planning process within GA and income target/KPI monitoring.
6. Undertake any other duties as required by the Director of Global Advancement.

This job description summarises the main duties and accountabilities of the post and is not comprehensive: the post-holder may be required to undertake other duties of similar level and responsibility.

Person Specification

The role of Senior Trusts and Foundations Manager is crucial to the delivery of Exeter's Campaign targets. The post-holder will require professional knowledge, an established network of contacts, a thorough understanding of higher education and charitable sectors, and an ability to understand complex projects and produce compelling funding proposals. You must have very highly developed and persuasive writing skills. 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 you will be required to demonstrate leadership skills, take

initiative, think creatively, show commitment and enthusiasm, be self-motivated, customer focused, target orientated and possess well-developed interpersonal skills.

| Competency | Essential | Desirable |
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| Attainments/Qualifications | <ul style="list-style-type: none"> • Significant track record of high level major gift fundraising and relationship management. • Evidence of securing major gifts from Trusts and Foundations through their own endeavours; experience of working with US and Corporate Foundations would be desirable. • Previous track record of delivering against individual financial targets. • An understanding or awareness of cross cultural business and philanthropy practice. • Excellent interpersonal, written and verbal communication and negotiation skills, with the ability to liaise confidentially and diplomatically both externally and internally at all levels and to a range of audiences. • Thorough knowledge of funding sources and potential revenue streams. • Experience of securing gifts through corporate philanthropy and industry links. • Knowledge of the Data Protection Act, GDPR and tax effective giving as it affects charitable donations from individuals and companies. • A thorough understanding of stewardship best practice. • A team player, able to work flexibly, positively and creatively with colleagues to achieve shared as well as personal goals. • Knowledge, experience and skills in IT, including Microsoft Word office applications, databases (Raiser’s Edge | |

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| | <p>experience preferred); email systems; a high level of competence in creating and producing reports and the ability to undertake own data entry as appropriate.</p> <ul style="list-style-type: none"> • Experience of managing a portfolio of projects/events at any one time or complex, high profile, high risk project/event management and able to work methodically. | |
| Skills and Understanding | <ul style="list-style-type: none"> • Outstanding written communication skills and editorial judgement, with demonstrable attention to detail. • Ability to work with, and influence, senior academic colleagues to develop new projects to maximise funding opportunities. • Effective communication, networking and negotiating skills involving decision-makers both internally and externally. • A clear understanding of what makes a proposal compelling and how to deliver this. • Extensive and evidential experience of drafting successful applications and proposals in order to gain financial support. • Proven ability to compile information from a variety of sources and present it as a coherent and compelling funding application. • Ability to use initiative to source information to inform proposals and bids. | |
| Prior Experience | | |
| Behavioural Characteristics | <ul style="list-style-type: none"> • Resilience, with the ability to see through complex projects and relations. • Ability to cope with a high-demand role, retain composure and able to learn from feedback. • A self-starter, requiring minimal help and supervision. | |

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| | <ul style="list-style-type: none"> • Ability to work at both strategic and operational/tactical level to meet the demands of the role. • Ability to confidently discuss complex issues with stakeholders to influence decision making in a diplomatic and thoughtful manner. • Track record of frequently seeking and acting on feedback. • Creative and able to generate ideas and revise approaches. • Able to take a values-based approach to fundraising. • Excellent team skills – able to influence colleagues, build rapport and trust and win support. • A strong networker who is confident socially, able to mix with a wide range of people. • A supportive team player, who helps, encourages and develops others with management and/or leadership experience. • Entrepreneurial with a high level of motivation and initiative and a demonstrable desire to succeed and achieve results. • Highly nuanced political and cultural sensitivity. • Ability to represent the University as a brand ambassador to external stakeholders. • Flexibility with respect to variable working hours including availability to travel frequently. | |
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Terms & Conditions

Our Terms and Conditions of Employment can be viewed [here](#).

Further Information

Please see our [website](#) for further information on working at the University of Exeter.