

## TRUSTS OFFICER

### 1. JOB IDENTIFICATION

Job Title: Trusts Officer

Responsible to: Philanthropy Manager (23/24 appointment)/Head of Fundraising initially

Department(s): Finance

Directorate:

Operating Division: NHS Lothian Charity

Job Reference: L-FIN-ELHF-TO

No of Job Holders: One

Last Update: November 2020

### 2. JOB PURPOSE

Lead on all aspects of applications to grant making trusts and foundations to maximise income for the charity.

To ensure that proposals for grant funding are thoroughly researched, the case for support carefully articulated, and high-quality applications are drafted and submitted to generate funds to agreed targets.

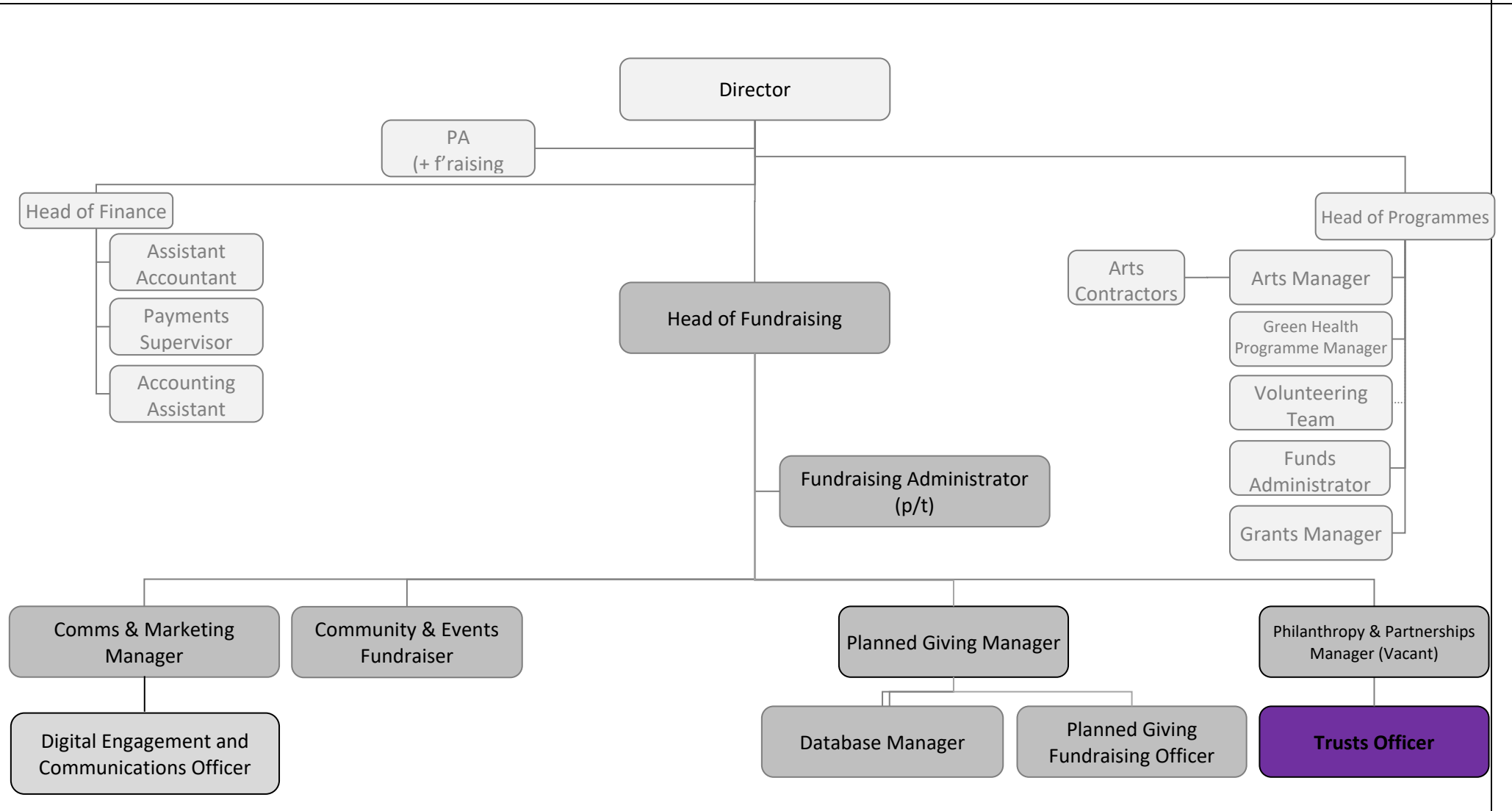
### 3. DIMENSIONS

#### Financial Responsibilities:

Responsible for an annual income target of circa £300k with a small <£5k expenditure budget with regular reporting to the line manager.

The postholder is employed within NHS Lothian and there may be a requirement to work flexibly across Lothian to meet service demands.

#### 4. ORGANISATIONAL POSITION



## 5. ROLE OF DEPARTMENT

NHS Lothian Charity is a registered charity which is regulated by the Office of Scottish Charity Regulators (OSCR). The charity provides a comprehensive endowment management and administration service to NHS Lothian.

Specifically:

Guide and support the Charity Trustees to meet regulatory requirements of OSCR.

Provide to the Trustees the financial information required for effective and appropriate decision-making, procuring expert advice and guidance where necessary.

Provide to the Charity Director a comprehensive endowment management and administration service.

Provide to the Fund Stewards a quality endowment management, guidance and administration service.

Provide a quality grant pathway from initial enquiry to file closure.

On behalf of NHS Lothian Board manage the Arts in Health, Green Health and Wellbeing Strategy.

Raise funds through a quality, customer-focused total development fundraising plan.

## 6. KEY RESULT AREAS

1. As specialist in Grant Making Trusts, develop and implement a strategy for Trusts, with agreed targets and plans, to be reviewed on a regular basis.
2. Working with fundraising colleagues, develop and manage a prospect and gift pipeline from grantmaking trusts, including corporate foundations and family trusts, assessing who is the best person to cultivate a specific relationship.
3. Research and submit comprehensive and high-quality applications to Grant-Making Trusts and Foundations.
4. Secure funding from grantmaking trusts which achieves or exceeds annual income targets.
5. Be responsible for managing and cultivating long-term relationships with grantmaking trusts with a person / organisation centred approach for relationship building.
6. Maintain accurate records on the database, with details of all trusts and grant making bodies, approaches made, grants received and responses noted.
7. Responsible for operational planning of activity to ensure that appropriate timetables are in place to reflect the policies of possible grant funders and that all proposals are consistent with the criteria set.
8. Work alongside the Programmes Team to set evaluation criteria for each project or service, and review outcomes and evaluate impact at regular intervals, providing required reports to grantmakers.
9. Monitor all successful applications and ensure funders receive reports of activities on time and with the required information and to ensure regular staged payments where appropriate.

10. With support from Marketing and Comms colleagues, develop a suite of materials, recognition opportunities and other tools that generate a strong stewardship plan for grantmaking trusts.
11. Ensure compliance with all relevant legislation including the Charities Act and Data Protection.
12. Contribute to the Fundraising Team's annual budgets, targets and plans as agreed by the Head of Fundraising and contribute to the planning process for Trust Fundraising.
13. Work with the Head of Fundraising and all team colleagues with updates through regular team meetings, ensuring that all activities are reported and seeking necessary support when greater resources are required. Share new ideas for potential improvement or opportunities.
14. Attend and help out at activities and events as part of the wider fundraising team.
15. Support NHS Lothian's values of quality, teamwork, care and compassion, dignity and respect, and openness, honesty, and responsibility through the application of appropriate behaviours and attitudes.

### **7a. EQUIPMENT AND MACHINERY**

Essential user of Personal Computer and networked systems within NHS Lothian. Use of office equipment: PC, photocopier, printer/scanner, smartphone for digital content and camera, telephone.

**Note:** New equipment may be introduced as the organisation and technology develops, however training will be provided.

### **7b. SYSTEMS**

Frequent day-to-day user of MS Office suite of software including Excel, Word, Outlook, PowerPoint and Project including the internet and social media.

Use of Customer Relationship Management (CRM) systems such as Harlequin, thankQ etc.

**Note:** New systems may be introduced as the organisation and technology develops, however training will be provided.

## **8. ASSIGNMENT AND REVIEW OF WORK**

Expected to manage objectives and workload autonomously.

Objectives will be agreed annually with the Head of Fundraising. The post holder is responsible for ensuring delivery of those objectives within the obligations of the post. Formal review will take place at mid-year and year-end. Update of objectives and review of progress will also take place through regular 1:1 meetings with the Head of Fundraising.

The day to day work of this post is self-directed in order to support delivery of the organisational strategic plans. Workload management is the responsibility of the post holder. The post holder is required to prioritise workload to ensure all the demands of the organisation are understood and all necessary deadlines are met.

The post holder's work will also be informed by issues and developments arising from external enquiries and opportunities. In addition, ad hoc assignments may be requested.

## **9. DECISIONS AND JUDGEMENTS**

Required to develop and produce targets and KPIs for trust fundraising activities and to input into the Fundraising report for Trustees and Committees and other internal reports.

To review and analyse the portfolio of Trusts to determine nature of the Trusts interests and customisation required to enable submission of robust application to maximise likelihood of success.

Required to work autonomously, guided by sector policy, regulations and best practice and taking into account agreed departmental and organisational strategic priorities, interpreting how these apply to work.

## **10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB**

Knowing and understanding the business of NHS Lothian Charity and its complex interrelationship with NHS Lothian and other connected charities, and the broader voluntary sector and competitive fundraising landscape.

Understanding and keeping up to date with the vast scope of the activities across NHS Lothian that the charity supports.

Establishing database for Trust applications, application timetables and protocols where none presently exist.

## **11. COMMUNICATIONS AND RELATIONSHIPS**

The postholder will be required to maintain key relationships and effective communication with a range of organisations and their representatives.

Communication will need to be appropriate and flexible to meet the requirements of the recipient(s), including funding applications and proposals, written reports, occasional newsletters, updates etc.

The information being communicated may often be complex: patient experience improvement programmes, capital projects, clinical research, with associated budgets, to be conveyed in a clear and concise manner for non-medical audiences. It will be communicated in order to solicit grants.

Examples of key relationships include:

### Internal:

NHS Lothian Charity colleagues.

Senior Management such as Director of Capital Planning & Projects, Associate Medical and Nursing Directors (about fundraising Cases for Support relevant to their area).

Senior Clinicians, Clinical Service Managers and Clinicians (As above).

Specific Fund Stewards (as above).

### External:

Local/national Trusts and Foundations (about all aspects of NHS Lothian Charity's work, and application processes/progress, and relationship development).

Solicitors (who may administer small grant-making trusts) (as above).

## 12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

### **Physical:**

On a regular basis sit at a desk using a PC/laptop for long periods of time inputting data and preparing written reports.

### **Mental:**

Requirement for translating complex and sometimes technical information or jargon into easily understandable layman's terms.

Prolonged concentration is required when drafting funding applications and for managing the database and analysing data.

Multi-tasking is required, with interruptions from telephone, colleagues and email.

Need to reprioritise work, and prepare information at short notice.

### **Emotional:**

High degree of personal resilience, especially in relation to developing funding applications, interpreting complex information and communicating these clearly and managing expectations of internal and external stakeholders.

Confidence when representing the charity through a range of media including public speaking which demands the ability to influence and persuade stakeholders.

### **Environmental:**

Required to maintain discretion and consider others whilst working within an open plan office environment.

Frequently spends long periods of time using a PC.

Occasional travel to meetings and events in the Edinburgh and Lothians region, to meet NHS Lothian staff members leading on projects for which funding applications are being prepared.

## 13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB

Educated to degree level in a relevant subject **plus** significant relevant experience of fundraising from trusts in a charity environment.

Membership of the Chartered Institute of Fundraising.

Knowledge of Fundraising Regulator's Code of Fundraising Practice and other relevant legislation including Health and Safety.

### **PLUS**

Proven track record of securing significant income through grantmaking trusts and foundations combined with specialist knowledge and understanding of Scottish grantmakers, including proven connections in the sector.

Proven skills in prospect research, strategic planning and project management delivery and evaluation.

Experience summarising complex issues in a concise and easily understood way.

Managing and reporting on income, progress against targets and KPIs.

Data analysis, management and reporting.

Excellent interpersonal and influencing skills and ability to build meaningful relationships with stakeholders.

Excellent IT skills including database management.

Excellent communication skills, with an excellent standard of written English, in particular a clear and articulate, persuasive written style.

**14. JOB DESCRIPTION AGREEMENT**

A separate job description will need to be signed off by each job holder to whom the job description applies.

Job Holder's Signature:

Date:

Head of Department Signature:

Date: