

Trust and Foundations Officer Job Description

Job Location:	Rosebery House, Edinburgh
Responsible to:	Partnerships Manager
Responsible for:	None

1. Introduction to Chest Heart & Stroke Scotland

NO LIFE HALF LIVED

Everyone has the right to live life to the full. After a diagnosis of a chest or heart condition or a stroke, many people experience fear and isolation and struggle with the impact on their lives. Chest Heart & Stroke Scotland won't stand for that. The care and support we deliver every day ensures everyone can live the life they want to.



Our Vision: welcome to a Scotland where people with our conditions can live their lives well. Full lives, with the right support, at the right time and in the right place. A place where you can shape your future and live the life you want to lead.

Our Mission: welcome to a community where people can support each other, secure the expert help they need and collectively advocate for the care that matters to them. Welcome to the charity that never underestimates the power of a cup of tea, a conversation started, a recovery begun.



No Life Half Lived means we need to listen to people with our conditions and deliver well for them. We have identified four goals to get us there.

We will place our focus on **addressing the unmet needs** of people with our conditions - social, emotional, and physical - across all Scotland's communities.

We will be **led by our people:** people with lived experience of our conditions, their families & carers, friends, colleagues and healthcare professionals.

We will secure the **funding required to deliver via a diverse income portfolio that is consistent with our values** and ethical approach.

We will be **effective and accountable** in all that we do.

We have developed six values to guide us in delivering against our goals:

Agile: we will be able to adapt to the needs of our people and the environment we work in.

Innovative: we will look for improvement in what we currently do and be creative in developing new services.

Inclusive: we will adopt a human rights based approach to our work and ensure we are accessible.

Accountable: we will take ownership for our work and hold decision makers to their responsibilities.

Collective: we can only achieve our goals by working together and learning from each other.

Courageous: we will say what needs to be said and do what needs to be done to meet our goals.



2. Fundraising Department

Over 80% of our net income coming from legacies and other donations together with income generating activities, including fundraising events, retail and trading.

The primary purpose of the Fundraising Department is to raise the money needed to deliver charitable services and provide the internal functions required to run the charity. We do this through a strategy of engagement, with a number of campaigns designed to stimulate support from the Scottish public, including: leaving a gift in their will; monthly and In Memory giving; responding to appeals; raising money in local communities; and taking part in a range of events.

Our aim in all of these is to develop long-term relationships with our supporters, so putting them at the heart of all we do is key to how we work. We also work to develop relationships with corporate bodies, trusts and foundations to support our charitable activities.

3. Job Purpose

This new role will provide vital support to the Partnerships Team, enabling them to maximise income generation through trusts, foundations and lotteries. The postholder will maximise income generation from trusts, foundations and lotteries. With a passion for writing and great attention to detail, the postholder will build strong relationships both internally across departments and externally with funders.

Key elements of the role include:

- Scoping and developing a portfolio of projects that will encourage funders to donate.
- Writing applications to a wide range of trusts, foundations and lotteries.
- Building, developing and stewarding relationships with funders.

4. Key Challenges

- Writing compelling applications which will stand out in a crowded marketplace.
- Working effectively with geographically dispersed internal teams.

5. Key Tasks

Trusts, Foundations and Lotteries

- To deliver a high quality trust fundraising programme to reach an annual income targets
- To effectively work across departments to scope and define appealing projects.
- To effectively manage a trust pipeline - continuously researching and identifying new opportunities for funding (via GrantFinder and desk research).
- To develop and prepare well written and persuasive applications for core and project funding to private charitable trusts, corporate foundations and lotteries.
- To fulfil all grant monitoring requirements from funders as appropriate as well as feeding back regularly to key staff within CHSS.

Systems and Compliance

- Use the 'Raiser's Edge' fundraising database to manage all potential and realised fundraising contacts across all programmes in line with data protection legislation; work with the Systems Officer to receive ongoing training and development in Raiser's Edge.
- To ensure compliance with any relevant Institute of Fundraising Codes of Practice across all programmes and areas of responsibility; ensure compliance with all accounting procedures for the recording of income, current legislation and CHSS administrative procedures.

General

- To maintain and develop good working relationships with key staff across CHSS so that funding requirements can be discussed, agreed and actioned.
- Contribution to strategic development of the team.
- To carry out other tasks in support of the Fundraising Department as required.
- To undertake other duties from time to time as directed by the Partnerships Manager.
- To comply fully with CHSS Policies and Procedures.
- To participate in the CHSS appraisal and support & development process.
- To attend training sessions and other activities as required.

6. Key Results/Objectives

To ensure that:

- An ambitious, strategic trusts strategy is developed and executed (with support from the Partnerships Manager) to reach or exceed targets year on year.
- All funders have a positive experience of working with CHSS and are keen to support further.
- Internal colleagues have a positive experience of co-developing projects with the Partnerships Team.
- A working trusts pipeline is developed and maintained.

7. Dimensions

Budget responsibility: The post holder will be required to manage a small budgets and effectively record and report all income received

Contacts:	(Internal)	Partnerships team Strategy Team Services Team Individual Giving Team Communication Team Volunteering Team
	(External)	Corporate foundations Family trusts Company trusts Solicitors Lotteries

The above job description is not exhaustive and is clarified to include broad duties inherent in the post. Evaluation and development of this post may, in time, indicate a need to revise duties herein.

Person specification

	Essential	Desirable
Education & Knowledge	<ul style="list-style-type: none"> • Degree or equivalent experience in the field • A good understanding of funding trends from trusts, foundations and lotteries • A good understanding of funding projects within the charity sector 	<ul style="list-style-type: none"> • Qualified member of the Institute of Fundraising (Certificate or Diploma) or working towards
Previous experience	<ul style="list-style-type: none"> • Experience in trust/foundations or lottery Fundraising or similar within the charity or education sectors • Robust evidence of generating income from trusts/ foundations or lotteries • Experience of writing persuasive applications/copy 	<ul style="list-style-type: none"> • Working knowledge of Raiser's Edge and online trust fundraising research.
Aptitudes, Skills & Abilities	<ul style="list-style-type: none"> • Excellent writing skills • Good personal organisation and time management skills, including the ability to initiate activities, be self-motivated, and work to tight multiple deadlines • Good interpersonal skills, including the ability to create, maintain and develop working relationships • Attention to detail 	<ul style="list-style-type: none"> • Knowledge of regulations related to trust/ foundations or lottery fundraising e.g. data protection, tax etc. • Creative thinker
Values & Attitudes	<ul style="list-style-type: none"> • Tenacity and perseverance • Commitment to self-development • Team player • Commitment to the ethos of the voluntary sector • Belief in the CHSS values (inclusive, courageous, agile, innovative, accountable, united) and ability to make these lived behaviours 	

Summary of Terms & Conditions of Employment

Term: Permanent

Salary: Grade 3(ii), Scale Points 27-34, £26,231 - £32,504 per annum
(Implementation of job evaluation exercise – review pending)

New appointments are normally placed at the base of the salary scale unless there are exceptional circumstances.

Hours of work: 32.5 hours per week (CHSS full-time is 32.5 hours)

Review of Work: The postholder is subject to the CHSS objective setting, supervision and appraisal process.

Annual Leave: CHSS leave year runs from 1st April to 31st March. Employees are entitled to 36 days annual leave in their first year of service (including public holidays). An employee will be awarded one extra day's annual leave for each complete year of service up to a maximum of 42 days (including public holidays). These allowances are pro-rated for part time employees and further pro-rated for those who join or leave CHSS during the leave year.

Pension scheme: CHSS offers a Group Personal Pension Plan, which has been established with Aviva. The Plan is a money purchase arrangement. You can choose at what rate you wish to contribute (subject to a minimum age related contribution) and how to invest your own contributions and those made by CHSS. The emerging fund at the point that you wish to take the benefits is then used to purchase a pension that is paid for the rest of your life.

Employee's and Employer's Contributions are paid on the portion of the employee's salary which is above the National Insurance contributions threshold (the Lower Earnings Limit). Employees who meet the relevant criteria are "automatically enrolled" in the scheme.

There are also schemes which provide death-in-service benefit and permanent health insurance.

Equal Opportunities: CHSS is committed to equality of opportunity and to no discrimination on the grounds of race, religion or belief, age, sex, marital or civil partnership status, disability, sexual orientation, transgender status, pregnancy or maternity.