

Post Title	Trusts & Philanthropy Officer
Reporting to	Development Manager (Major Gifts)
Staff reporting to this post	None
Liases with	All colleagues in Development, also Marketing & Communications, Engagement, Estates, Lundy and external suppliers.
Hours	Full time (35hrs/wk)
Contract Term	Permanent
Department and Location	Development Office at Shottesbrooke, near Maidenhead, SL6 3SW Hybrid working options are available
Date of document	15 July 2024

We are one of Britain’s leading heritage conservation charities. With the help of our supporters, we save historic buildings in danger of being lost forever, restore such 'Landmarks' using skilled craftspeople and their apprentices, and make them available for all to enjoy for holidays. This income supports their ongoing care, whilst free open days and engagement with communities ensure that even more people can learn about and experience these extraordinary places. We have an ambitious pipeline of building rescue projects across the UK, from a WW2 control tower in Hampshire, to a Palladian villa near Edinburgh, and all depend on the success of our fundraising.

Role summary and purpose

This is a new role to build capacity in a successful programme of philanthropic giving from trusts, foundations and individuals supporting capital appeals for award-winning heritage conservation projects, and other areas of our work including the island of Lundy. By managing your own portfolio of supporters and prospects you will bring high standards of donor care to grow income and sustain long-term relationships. The role includes trusts prospect identification and research, writing proposals, case studies and updates to demonstrate impact. Some travel will be required for site visits, meetings and events to engage supporters and prospects face to face with our varied work throughout the UK. Reports to the Development Manager (Major Gifts) and works closely with eight other colleagues in the Development team, and others throughout the organisation.

Key accountabilities

- Lead on all communications and appeals to small and mid-level trusts (up to £10k). Manage a portfolio of larger trusts & foundations (£10k+) with the Development Manager (Major Gifts).
- Manage a portfolio of donors to projects and appeals (typically up to £10k per gift).
- Develop compelling proposals and applications for funding to support heritage conservation projects, appeals and other areas of work including environmental sustainability, craft skills, public access and engagement.
- Achieve a personal income target in support of the overall targets for trusts and foundations, and individual giving to projects and appeals.

Duties & responsibilities

Work with the Development Manager (Major Gifts) to:

- Develop an effective strategy for charitable trusts and foundations.
- Grow and maximise trusts income in line with overall objectives and plans.
- Maintain and a rolling pipeline of trusts, identifying and cultivating new opportunities.
- Draft project updates and other stewardship communications for trusts and individuals.

Prospect research:

- Lead the research to identify and maximise the potential of new trust and foundation prospects, using an external agency as required on specific projects.
- Work with the Development Manager (Major Gifts) to agree prospect allocation and approaches.

Proposals and applications for support

- Produce tailored, high quality and inspirational funding proposals for trusts and individuals.
- Submit timely applications to trusts and foundations.
- Work with other teams (estates, engagement, history, Lundy) to identify needs and opportunities for funding as agreed with the Development Director.

Supporter stewardship:

- Utilise events, digital engagement, and other stewardship methods throughout the year to provide opportunities to thank current trust supporters and engage new prospects.
- Act as lead contact for a small portfolio of individual supporters.

Reporting and evaluation:

- Be responsible for the stewardship of existing relationships and work with teams across the organisation to fulfil grant monitoring and reporting requirements.
- Work with the Data and Supporter Services Officer and the Finance Team to ensure accurate financial reporting and reconciliation.
- Maintain contact records within the Salesforce CRM database, and a grant reporting cycle.

Compliance:

- Ensure that the work with trusts and foundations is compliant with all legal and regulatory requirements (including data compliance and regulation).
- Keep up to date with any changes and operate in line with the codes of practice, sector best practice and industry standards.

Financial

- Contribute to the setting of budgets (income targets and expenditure).
- To manage the safe and proper handling of, and accounting for, income arising from your areas of responsibility.
- Monitor and manage all income and operating costs within given budgets and areas of responsibility. Liaise with Finance to ensure information is supplied in a timely manner to meet deadlines.
- Continually strive to improve margins, reduce costs and wastage as well as suggesting improvements in operating processes at a specific and at a general level.

General

- To support the Development Director in fundraising planning and strategy.
- To take personal responsibility for all the administration and database requirements arising from the post holder's role, ensuring accurate and up to date records are maintained.
- Comply with the Fundraising Code of Practice, GDPR, PECR and any other legal obligations.
- To appreciate, and work within, the organisation's culture and to conduct all activities in a manner which promotes and enhances the Landmark Trust's character and reputation.
- To undertake any other duties as may be reasonably required in the post.

This is an outline job description that may be subject to change in consultation with the post-holder.

PERSON SPECIFICATION

Category	Essential	Desirable
Education and Qualifications	A' Levels or equivalent qualifications.	Evidence of CPD in fundraising, and/or Chartered Institute of Fundraising courses & qualifications.
Experience	Demonstrated success in securing funds from trusts and foundations.	Experience of philanthropy and private giving by individuals.
	Examples of writing marketing or fundraising reports and proposals, updates etc.	
	Experience of working to agreed targets.	
Competencies & skills	Ability to write for different audiences, create compelling proposals, case studies other donor communications to a high standard and a variety of audiences.	
	Ability to build and maintain relationships.	
	Excellent organisational, administrative and project management skills.	
	IT literate. Proficient in MS Office suite (Word, Excel, PowerPoint) and Outlook email.	
	Experience of fundraising CRM databases.	Salesforce database experience
	Skills to produce well-presented and professional documents, often to tight deadlines.	
	Meticulous attention to detail and the ability to plan and prioritise.	
	Self-motivated with the ability to progress several tasks simultaneously and maintain time scales, including when working under pressure.	
	Methodical and organised approach to tasks.	
	Ability to problem-solve and think creatively.	
Other Requirements	Positive, can-do attitude with a proactive and flexible approach.	Knowledge or interest in heritage, and/or the natural environment.
	Empathy with and commitment to the work of the Landmark Trust.	
	Able to work alone and as part of a team.	
	Comfortable with change and with a willingness to learn.	
	Able to attend events, occasionally on evenings and weekends with overnight stays.	Full driving licence and confident using it.

WORKING AT LANDMARK

Newcomers say we're a friendly bunch who work hard. We are a flat, agile organisation, proud and passionate about the work we do.

Our benefits package includes hybrid and flexible working options and following probation, enhanced sick and holiday pay and pension and life assurance. There's also a relaxed dress code, staff welfare support through our Employee Assistance Program, a training and development scheme and opportunities to take part in our property review scheme.

CONTRACT DURATION

Permanent full-time position.

LOCATION

Our offices are based on the Shottesbrooke Park estate in the village of White Waltham near Maidenhead. Within the leafy surroundings are a 14th-century church, lake, walking paths and lots of wildlife. Converted stables and a farmhouse form the office base for the director and functional teams. We often meet for lunch around the kitchen table and go for walks in our breaks.

SALARY

In the range of £30,000 per annum depending on skills and competencies, paid monthly in arrears.

WORKING HOURS

35 hours a week.

HOLIDAYS

The holiday entitlement is 25 days per annum plus statutory holidays.

SICK PAY

During the probationary period you will only be paid your Statutory Sick Pay entitlement. After this period, you will receive full basic pay during any sickness absence up to 20 days in any 12-month period. The Statutory Sick Pay will be included in this sick pay. Where absence exceeds seven consecutive calendar days and in certain other circumstances, a doctor's certificate will be required.

PENSION SCHEME

You will be automatically enrolled in Landmark's pension scheme.

MEDICAL HEALTH

Private health insurance, currently with BUPA, will be provided when you have been with Landmark for a year. Landmark's contribution will be pro-rated for part-time employees.

NOTICE

The appointment is subject to satisfactory completion of an initial 6 month probationary period, though this may be extended if more time is needed to assess suitability for employment. During this period the post will be subject to one week's notice on either side. Notice in writing on either side after the end of the probationary period is according to your Contract of Employment.

HEALTH & SAFETY

All staff are expected to observe all health and safety at work regulations as set out by Landmark in accordance with statutory requirements.

CONTRACT

The successful applicant will be required to sign Landmark's Contract of Employment.

The purpose of this information is solely to help prospective employees to understand the details of Landmark's Conditions of Employment. It is not an offer of employment and does not form part of the Contract of Employment or the Job Description.