

**Operational / External Title: Senior UK Trusts Manager**

Role Title:	<b>Senior UK Trusts Manager</b>
Date of JD Review:	<b>January 2025</b>
Department:	<b>Funding</b>
Team:	<b>Philanthropy &amp; Partnerships</b>
Tenure:	<b>Full time &amp; Permanent</b>
Band & Range:	<b>Band D</b>
Location:	<b>London- Hybrid</b>
Reports to:	<b>Head of Trusts and Global Markets</b>
DBS check required:	<b>Yes</b> [ <a href="#">DBS Roles</a> ]
Role requires travel(International):	<b>No</b>
Budget Holder	<b>Yes</b>
Direct Reports:	<b>Yes 1</b>
Indirect Reports:	<b>No</b>
Dotted line reports:	<b>No</b>
Does This role require Travel:	<b>some</b>
<p>Internal Key Contacts: Data Protection, Other Philanthropy &amp; Partnership sub-teams (especially Strategic Funding &amp; Insight), Programme Quality &amp; Assurance, Business Development, Finance, Country Teams, Executive Leadership, Brand, Digital, Media, Advocacy, Policy and Impact &amp; Innovation.</p> <p>External Key Contacts: Trusts donors in the UK, peers at other charities.</p>	

## **Purpose Of the Role:**

To co-lead on Foundation relationships within the UK, with a focus on account management. Developing an exciting program of relationship building via networking, events and excellent stewardship, this role will build on a thriving UK Trusts program by developing existing donors and some new prospects, plus managing the UK Trusts Specialist with a view to raising significant income for ActionAid's work with women and girls across the world.

## **Main Accountabilities:**

### **Donor relationships**

- Account manage and steward a small portfolio of high-value UK trusts & Foundations donors, currently bringing in around £3.5 million per year.
- Lead the relationship management with one of ActionAid UK's biggest donors, including regular stewardship, attending events, any overseas trips, briefing senior stakeholders, and coordinating with internal colleagues at ActionAid UK and members of the international federation on relationship management.
- Build and maintain the profile of one of ActionAid UK's biggest donors across ActionAid UK and the wider federation, seeking to unlock deeper partnership and further funding opportunities.
- Working with colleagues across ActionAid UK, develop individual stewardship, engagement and communications strategies for each trust to maintain and grow key strategic partnerships. Raise awareness of ActionAid to inspire existing and prospective donors to engage with and support international development, campaigns and humanitarian work through proactive networking and by communicating ActionAid's work persuasively through face-to-face meetings, presentations, phone calls, written communications and targeted funding applications
- Work with the Strategic Funding and Insight Team to identify matches between grant makers' funding priorities and ActionAid's projects. Draft tailored and targeted funding applications ensuring that funders' priorities are carefully balanced with ActionAid's funding needs.
- Continuously seek innovative and creative opportunities to deepen and broaden relationships with donors/prospective donors, trust staff and trustees through ActionAid UK events or overseas trips to visit ActionAid's work, and by strategically involving senior staff and country programme staff where appropriate.
- Proactively identify and attend external meetings and seminars that are relevant to the team's work, and/or provide new networking opportunities with donors.

- Regularly monitor funding interests, income and expenditure trends, information about trustees, application procedures and any other relevant information.
- Work with the Philanthropy and Private Sector Partnerships teams to identify links between their networks and your portfolio, to maximise opportunities for stewardship and new business.

## Strategy

- In collaboration with the Head of Trusts & Global Markets and alongside the other Senior UK Trusts Specialist, co-lead the strategic development of the UK Trusts programme, creating and implementing an engaging strategic plan.
- Lead the funding strategy development for one of ActionAid UK's biggest donors, including how flexible funds from this grant is accessed across the federation, working closely with Senior Leadership, Programme Quality Assurance, Finance, Business Development and Strategic Funding & Insight, and Communications colleagues.
- Lead the internal Project Accountability Group for one of ActionAid UK's biggest partnerships.
- In collaboration with Strategic Funding & Insight team and the wider P&P team, work to drive forward strategic work on unrestricted funding, highlighting and maximising the impact of it and collaborating with existing relationships with flexible donors to influence other donors.
- Keep up to date with trends in the global funding environment and specific trends in the UK Foundations sector.
- Monitor income in relation to targets and explain any variances in performance

## Grant and data management

- Working with the Strategic Funding & Insight and Programme Quality Assurance teams, coordinate reporting on donor projects and other communications in a timely and engaging manner, and in accordance with the donors' reporting requirements, going the extra mile where possible to demonstrate excellent stewardship.
- Working with the Strategic Funding & Insight and Programme Quality Assurance teams, ensure good working knowledge of all existing grants. As required, liaise with country programme staff to monitor budgets and expenditure and report back to donors, ensuring their criteria are understood and implemented.
- Maintain up-to-date records of all communications with trusts and foundations and enter all pertinent information on databases and other systems in line with data protection legislation.

- Ensure that donors are thanked promptly and appropriately as soon as grants are received and that all grant set-up procedures are followed, to support smooth project implementation

### **Team Working**

- Play an active role within the Trusts & Global Markets team. Contribute to annual plans, attend regular team meetings and represent the team working collaboratively in cross-team working groups e.g. emergencies working group.
- Drive continuous improvement in all aspects of team operations, with regular meetings to share information and discuss progress and initiatives, contribute ideas and share learnings within and across teams.
- Build relationships and work collaboratively with colleagues across ActionAid UK to support funding opportunities and donor stewardship.
- Support the team to deliver our exciting annual programme of donor events to steward existing donors and attract new supporters.
- Ensure that ActionAid UK's CEO, Directors, Trustees and programmes colleagues understand and are appropriately involved with Trusts and Foundations donor partnerships.

### **To be a key part of the Fundraising Department**

- Engage with and demonstrate commitment to ActionAid UK's mission, vision, values and strategic aims, ensuring alignment with wider team's vision, plans and objectives.
- Support implementation of the Funding strategy.
- Continually improving digital skills and knowledge within the working environment (where possible, especially within donor stewardship).
- Ensure that all relevant supporter legislation is adhered to, referring to guidance from the Fundraising Regulator, Information Commissioner's Office (ICO), General Data Protection Regulation (GDPR) and any other relevant codes of practice.

- Proactively engage with the performance management system and take responsibility for seeking appropriate development opportunities including attending relevant organisational and external training courses.

### **People Management and Supervision**

- Line manage the UK Trust Specialist to deliver against KPI's - recruiting talent, ensuring the right skills and tools, having regular 1:1's focusing on performance, objective setting and development opportunities, and pro-actively managing any sickness absence and performance management issues.
- Aim to be an excellent line manager and model feminist leadership behaviours.

## **EXPERIENCE, KNOWLEDGE & EXPERTISE**

### **Essential Criteria:**

- Commitment to AA's vision, [mission](#) and values, including a commitment to [feminist principles](#), safeguarding, and working in an organisation committed to working for the rights of women and girls.
- Commitment to AA's values of Equality, Diversity & Inclusion and upholding the values of becoming an anti-racist decolonised INGO.
- ActionAid UK is committed to preventing any form of sexual harassment, exploitation, and abuse (including child abuse and adult at-risk abuse) and responding robustly when these harms take place. We expect all ActionAid UK Staff and ActionAid UK Associated Personnel to share this commitment.
- Commitment to continually improving your digital skills and knowledge within the working environment.
- Significant proven experience of building and maintaining relationships with Trusts and Foundations, or similar high value donors, that has resulted in £100k+, multi-year gifts and an ability to hit financial targets.
- Experience of successfully building rapport with individuals to develop relationships with donors, especially at a senior level.
- Strong networking, negotiating, interpersonal and influencing skills and the ability to 'close the deal'.
- Experience working collaboratively with senior internal stakeholders to cultivate donors.

- A proven ability to articulate complex issues in a compelling and persuasive manner and to present a pitch with confidence, leading to relationships deepened and funds secured.
- Polished writing skills, with a proven track record in producing high quality written materials and experience adapting writing style to a range of different communications.
- Self-motivated with experience of working in a cooperative and flexible way as part of a busy team and working independently.
- Entrepreneurial, innovative and ambitious with excellent attention to detail.
- Confident IT skills to enable the production of visually appealing and professional Word, PowerPoint and Excel documents.

### **Desirable Criteria:**

- Experience of living and working in the “Global South”, especially regions where we are funding programmes & projects
- Experience of working for an INGO
- Knowledge and experience of proposal development and grant management (preferably in the international development/aid sector)
- Demonstrable numerical and analytical skills and the ability to interpret the salient information from a financial budget
- Understanding of CRM databases.
- Experience of line management
- Experience supporting the delivery of high-quality events.
- An understanding of international development, women’s rights and/or humanitarian work.
- Ability and willingness to travel overseas and in the UK (a few times per year).

It is expected that everyone at ActionAid UK will work to support and strengthen our desired culture of being bold, connected, diverse, optimistic, open and respectful through the way they approach and deliver their work by:

- Being accountable and responsible – your individual way of working
- Being innovative and collaborative – how you get things done
- Being empowering and trusting – how you build and sustain relationships.