

Operational / External Title: Trusts Manager (2 Roles Available)

Role Title:	Trust Specialist
Date of JD Review:	March 2025
Department:	Funding, Philanthropy & Partnerships
Team:	Trusts and Global Markets
Tenure:	Full time & Permanent
Band & Range:	Band C
Location:	London & Hybrid
Reports to:	Senior UK Trusts Specialist
DBS check required:	Yes/No [DBS Roles]
Role requires UK travel:	Yes- Potential
Budget Holder	No
Direct Reports:	No
Indirect Reports:	No
Dotted line reports:	No
Does This role require international Travel:	Yes- Potential
<p>Internal Key Contacts: Data Protection, Other Philanthropy & Partnership teams (especially Strategic Funding and Insight), Finance, Country Teams and Executive Leadership, where necessary for donor relationships and events.</p> <p>Wider teams e.g., Brand, Digital, Media, Policy, Impact & Innovation – where these support on partnerships.</p> <p>External Key Contacts: Trusts donors in the UK, peers at other charities</p>	

Purpose Of the Role:

The Trust Specialists will work with Trusts and Foundations in the UK and Liechtenstein to build relationships and maximise funding opportunities in support of ActionAid's work across the world with women and girls. The Trusts Specialists will continue to develop a thriving portfolio via excellent stewardship, meetings, events, networking, and the management of our unrestricted small trusts programme. These roles will develop existing relationships with Trusts and Foundations giving at the £25k-£100k level, and support with the development of larger partnerships with a view to raising ~£200k to £250k per annum. The Trust Specialists will also support the Senior Trusts Managers with their management of larger transformative gifts and the cultivation of a pipeline of funders based in the Liechtenstein market.

Please note that we are recruiting two posts for this role. We anticipate that both posts will each manage a small portfolio of trusts giving at the £50k-£100k level, with one post then focusing on the management of our strategic small trust mailing campaign; and the other post focusing on new business. The exact responsibilities of each post will depend on the strengths and interests of the successful candidates and will be discussed at interview.

Main Accountabilities:

Donor Relationships

- Account management and stewardship a portfolio of mid-level UK trusts & foundations donors (predominantly those giving between £25-100k per annum as well as ActionAid's small trust portfolio), bringing in around £250k per year.
- Develop individual stewardship, engagement, and communications strategies for each trust to maintain and grow key partnerships.
- Support the Senior UK Trusts Managers with large strategic partnerships and opportunities.
- Communicate ActionAid's work persuasively through meetings, presentations, phone calls, written communications, and targeted funding applications.
- Raise awareness of ActionAid to inspire existing and prospective donors to engage with and support international development, campaigns, and humanitarian work through proactive networking.
- Work with the Strategic Funding Team, to identify matches between grant makers' funding priorities and ActionAid's projects in need of funding, ensuring that funders' priorities are carefully balanced with ActionAid's funding needs.

- Regularly monitor funding interests, income and expenditure trends, information about trustees, application procedures and any other relevant information.
- Attend external meetings and seminars that are relevant to the team's work, and/or provide new networking opportunities with donors.
- Work with Trusts, Philanthropy and the Private Sector Partnership colleagues to identify links between their networks and your portfolio, to maximise opportunities for stewardship and new business.
- Lead on the management of ActionAid's small trust portfolio – managing stewardship mailings and appeals during emergencies and other strategic opportunities, as well as identifying those with potential to grow into the medium or large trust portfolios.
- Where opportunities arise, lead donor trips to visit ActionAid's work.
- Raise awareness of ActionAid's humanitarian work and proactively raise funds to support emergency appeals.

New business

- Approach and create cultivation plans for UK and Liechtenstein registered prospective trusts and foundations.
- Raise awareness of ActionAid to inspire prospective donors to engage with and support international development, campaigns and humanitarian work through proactive networking and by communicating AA's work persuasively through face-to-face meetings, presentations, phone calls, written communications and targeted funding applications.
- Seek opportunities to engage new prospects during humanitarian appeals. .
- Monitor ActionAid's corporate partnerships inbox and respond to opportunities that come through – work with relevant teams to determine the value of each opportunity and how to take these forward.

Grant and data management

- Work with the Strategic Funding Team to 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.
- Work with the Strategic Funding Team to 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 onto ActionAid's CRM, 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.

Teamwork

- Play an active role within the Trusts and Global Markets team. Contribute to annual plans, attend regular team meetings and represent the team working collaboratively in cross-team working groups.
- Build relationships and work collaboratively with colleagues across Philanthropy and Partnerships team to drive income growth and maximise opportunities.
- Work with the AAUK Events and Community Fundraising Team, Brand/Communications teams and other relevant teams, on employee fundraising and pro-bono opportunities with corporate foundations and producing external assets for donor audiences.
- Support the fundraising department with delivery of exciting and innovative events programmes to help steward existing donors and attract new supporters.

To be a key part of the Funding Department and wider organisational work.

- Engage with and demonstrate commitment to AAUK's mission, vision, values and strategic aims, ensuring alignment with wider team's vision, plans and objectives.
- Support implementation of the Fundraising and Resource Mobilisation strategy.
- Commit to taking a Digital first approach to fundraising ways of working (where possible, especially 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.
- Proactively engage with ActionAid's journey to becoming a decolonised and antiracist organisation.
- Represent the team in interagency fundraising meetings and other relevant working groups.

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.
- Experience of building and maintaining relationships with high value supporters, preferably Trusts and Foundations, that has resulted in £50k+ gifts and a proven ability to hit financial targets.
- Experience of successfully building rapport with individuals to develop relationships with existing donors and prospects.
- Networking, negotiating, interpersonal and influencing skills.
- Experience working collaboratively with 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 audiences.
- Demonstrable numerical and analytical skills.
- Self-motivated with experience of working in a cooperative and flexible way as part of a busy team and working independently.
- Innovative and ambitious with excellent attention to detail.
- Confident IT skills to enable the production of visually appealing and professional donor communications. And an understanding of CRM databases.

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, including unrestricted funding
- Experience of managing fundraising mailings and campaigns
- Experience supporting the delivery of high-quality events.
- Experience or understanding of international development, women's rights and/or humanitarian work.
- Experience living or working in Africa, Asia, or Latin America.
- Ability and willingness to travel overseas and in the UK.

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.