

## **Generic Job Description – The Cheltenham Trust**

### **Fundraising and Development Producer**

**Particular to the role of:** Fundraising and Development Producer

**Post No:**

**Grade:**

**Location:** The Wilson

**Responsible to:** CEO

**Responsible for:** Assistants and Volunteers

#### **Part A: Job purpose**

The Trust roles are based on generic and specific trust wide responsibilities and operational responsibilities.

- To co-ordinate and develop both the enterprise and charitable elements of The Cheltenham Trust activity.
- The post holder will support the Fundraising and Development function in terms of trust development, trust delivery and trust co-ordination, policy support and resource support through a period of significant change and development of the Trust.
- To identify, develop and present to the fundraising and development opportunities to expand the activities of the trust in terms of income generation and projects across all areas of fundraising.
- To work with relevant staff to support development of the Trust's operations, delivery and outcomes in support of future plans and to finalise funding responsibilities with existing projects and funding streams.
- To work with relevant staff to research information to support the formulation of plans, funding opportunities, high level events and advocacy opportunities.
- To work as a team member to co-ordinate operational delivery against delivery plans and day to day business to meet fundraising and development needs.
- To work collaboratively with internal teams, trustees, partners and key stakeholder, undertake consultation and collaboration in pursuit of the trusts objectives and to actively seek and develop funding bids working effectively with staff and stakeholders.
- To record performance, finance and maintain appropriate reporting information, evaluation mechanisms and actions plans to underpin the trust's activity, enable business design and provide information; meeting KPI's and monitoring progress.

- To effectively manage budgets as set out in the scheme of delegations against bids, funder expectations, wider project framework for new projects and requirements of the projects.
- To contribute to programme and project development working across The Cheltenham Trust in teams and individually.
- To evaluate projects, develop advocacy documents, support content development for press releases and support development, reputation management at all times.

## **Part B: Main Areas of Work**

### Strategy

- To keep in touch with current practice, changes in legislation; identify future trends and recommend operational direction for fundraising to enable sound operation of the charity, within the Charity Commission guidelines.
- To work with the stakeholders, partners, other agencies and community and voluntary groups to develop The Cheltenham Trust
- To prepare and present reports associated with The Cheltenham Trust Executive Team
- To support the Executive Team in the implementation of a performance and evaluation strategy, improvement plan and to meet the key objectives of the trust.
- To develop enterprise and commercial activities through managing set budgets, contributing to the creation of surplus and implementation of growth strategies.
- To support the fundraising function in the preparation of the annual plans and forward plans.
- To undertake risk management within the trust's policy.
- To comply and implement the health, safety and welfare policy and all other trust policies and procedures.
- To identify growth opportunities for the trust that deliver value socially, economically and financially.
- To ensure that the trust's equal opportunities policies are followed.

### Trust Delivery

- Ensure the continued commitment to customer experience and satisfaction through the delivery of high quality services and organisational performance.
- Uphold the trust's positive profile at all times and undertake communications by adhering to the relevant policy.
- Work effectively through matrix working, programme delivery and project management.
- Foster an enterprise and commercial culture across teams at all times through encouraging a positive environment, risk taking and sound business acumen.
- Ensure the successful development of the trust through staff consultation and involvement.
- Undertake consultation with key stakeholders and through collaboration with partners.
- Employ, where appropriate, the use of digital mediums to enhance the Trust's delivery and development

### Resources - Finance

- To regularly monitor finances within budget, as agreed with the Executive Team and notify them of potential variances.

- Ensure all resources (including IT hardware and software) are used safely, legally and efficiently.
- Ensure the area of responsibility complies with financial regulations and all other trust policies and maintains systems for ensuring financial probity.

### **Part C: Specific Responsibilities:**

#### **Key Result Areas**

Responsibility to develop and facilitate specific fundraising activity for The Cheltenham Trust:

- To meet the expectations in specific fundraising plans and targets as agreed by the CEO and Executive Team; research, relevance of bids and funding opportunities, creating a 'fit' between bids and Trust projects; working with teams to develop bids and submitting on time relevant bids.
- Team player, who will work with teams to draw out key information for bid writing, whether for corporates, high net worth individuals, trusts and foundations, government funding, private sector etc.
- Ability to confidently present to small and larger groups, to promote the Trust and 'sell' the Trust's products, projects and services to maximise income.
- To provide regular reports to the Executive Team on fundraising activity (monthly) and meet KPI's and targets monthly.
- Ensure a good stakeholder relationships at all times, with the public, key donor organisations, potential funders and corporate sponsors in support of the strategic direction of The Cheltenham Trust
- To deliver fundraising initiatives to meet the financial and supporter targets as set by the Executive Team; from research, bid writing and funder liaison, to project delivery, monitoring and evaluation delivering key outcomes, clear financial controls and ensuring compliance with the quality of product.
- Ability to work with the front of house team to support through training, a donation strategy and delivery plan, gift aid support and upselling donation opportunities by the public.
- To maintain the fundraising data base to ensure that all information is completed and appropriately used to support fundraising activity; utilise Spektrix as the fundraising system for transparency and smooth operations.
- To manage fundraising events successfully from concept through to evaluation and follow up contacts
- To support the Trustees, CEO and Executive in developing relationships with key potential funders through meetings, events and tours.
- To work with commercial sponsors, individuals and organisations through a clear stakeholder matrix in support of fundraising activity; working across the marketing team, hires team, front of house teams and other areas of the Trust
- To deliver the income required to support the public programme and organisational development for TCT.

#### **Job Specification**

##### **Experience**

- Significant experience of working in a fundraising and development environment for a minimum of three years; ability to work across all fundraising and development areas
- Experience of successful delivery of fundraising targets which have been set strategically and delivered effectively working across teams and with stakeholders

- Experience of working in the cultural and sports sectors or a similar field, demonstrating broad based fundraising activity across more than one area
- Excellent record of good stakeholder and fundraising relationships, with demonstrable outcomes that realise fundraising targets
- Experience in working with fundraising databases to support fundraising activity
- Excellent interpersonal and communication skills, with experience of public speaking and stakeholder management
- Experience in research to support fundraising activities

Knowledge, skills and abilities (Essential):

- Demonstrable fundraising skills, including project planning, use of databases, stakeholder relationship building
- Commercial and enterprising ability to work with external stakeholders in partnerships and through specific projects, programmes and matrices to ensure that targets are met
- Good interpersonal skills, ability to relate to people at different levels including the staff, stakeholders and the public
- Knowledge of the cultural and sports sectors
- Self-assured team player

Qualifications:

- Educated to degree level – in either a relevant subject

**Ability to work to and uphold The Cheltenham Trust Values:**

**Trust Values**

- Considered – each member of staff will consider the reputation of the trust and uphold a professional approach within this post
- Committed – each member of staff will be committed to the charitable objects of the trust and understand their role in achieve these objectives
- Collaborative – each member of staff will work with others across the trust and organisations outside the trust in a professional manner
- Creative – each member of staff will be creative in their approach to problem solving and developing new ways of working to enable the trust to realise its goals