



FUND DEVELOPMENT MANAGER

**SUPPORTING DONORS TO GIVE WITH IMPACT AND GROWING LOCAL
PHILANTHROPY BY CORPORATES AND TRUSTS & FOUNDATIONS**

JOB DESCRIPTION

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PERSON SPECIFICATION

JOB TITLE:	Fund Development Manager
HOURS:	Permanent role Full Time or Part Time – flexible working options will be considered such as condensed working week, term-time only or flexed hours contracts.
SALARY:	£29-£40k FTE
PENSION:	The Foundation has an automatic enrolment workplace pension scheme with NEST and will pay, on behalf of the employee, 6% of the basic annual salary (in addition to the basic annual salary).
HOLIDAYS:	6.6 weeks holiday per annum (pro rata), in addition to public holidays pro rata for part time work. An additional day's leave is awarded for every 3 years' of continuous service up to an agreed maximum of 30 days leave. An additional 2 days leave per annum is also available to undertake voluntary work for a charitable cause, at the discretion of the Chief Executive.
LOCATION:	Countywide throughout Surrey. The post-holder will be based at the Foundation's offices in Woking. All staff must attend Woking Office on Mondays; remote working is possible for other working days. This post will require visiting all areas of Surrey to meet with our donors and prospective donors.
TRANSPORT:	Car mileage allowance for event attendance
PROBATIONARY PERIOD:	6 Months
ACCOUNTABILITY:	Reports to Director Partnerships & Development, with ultimate responsibility to the Chief Executive and to the Chair and Board of Trustees

JOB PURPOSE

The Fund Development Manager will play a key role in supporting the Director of Partnerships & Development in the delivery of the Foundation's strategic objectives:

Grow and Thrive: Building long-term, sustainable support for Surrey's communities to ensure resilience.

Grow Giving: Encouraging and facilitating philanthropy at all levels across the county.

Grow Impact: Utilizing local insight and evidence to drive positive, lasting change.

Grow Reach: Ensuring equity and inclusion across all communities within Surrey.

The primary focus of the role will be to grow and develop a portfolio of funds, by working directly with donors and fund owners to support them to grow their funds and support their Philanthropic impact.

This role has particular responsibility to lead on growing and developing our relationships Corporates, Professional Advisors and Trusts & Foundations with a view to bringing on board new donors and fund owners.

The role also support the delivery of an efficient and effective grants programme, helping donors award funding in ways that strengthen Surrey's voluntary and community sector whilst enabling informed, impactful giving.

We're looking for someone with a strong interest in social issues and community needs in Surrey, with experience of income development and great interpersonal skills to develop relationships with a wide range of stakeholders. This role will play a key part in strengthening and developing our network of Funds at a time when they are increasingly important in supporting our local communities.

ROLE OVERVIEW

The key areas of responsibility include:

- Directly manage, develop and grow a portfolio of donor-owned funds, ensuring excellent customer relationship management of fund holders and donors.
- Develop relationships with potential donors and referrers of donors from the Corporate, Professional Advisor & Trusts & Foundations sectors.
- Develop and maintain in-depth knowledge of Surrey charities and voluntary organisations, working closely with the Grants Team to understand applications, reporting and community needs.
- Act as an effective ambassador for the Community Foundation for Surrey.

KEY RESPONSIBILITIES

The specific responsibility of the Area Fund Development Manager include:

Management & Development of Donor Funds

- Directly manage, develop and grow a portfolio of donor funds, owned by Corporates Trusts and Individuals, ensuring excellent customer relationship management of the fund holders and donors, working to understand their motivation for giving and matching them with applications for funding from charities and community groups.
 - Provide exemplary customer care and stewardship.
 - Secure planned donations and support income forecasting.
 - Share grant funding applications with donors in line with fund aims and objectives and support their decision-making.
 - Coordinate regular donor communications including grant updates and impact reporting.
 - Arrange and accompany donor visits to funded charities and projects as required.
 - Respond to and resolve donor enquiries and requests.

Bringing on board new Fund Owners – income generation

- Using our existing database and other tools available, identify and cultivate relationships with prospective Corporate and Trust & Foundation donors in order to develop new donor funds, which the post holder or others in the organisation will manage
 - Lead on Trusts & Foundations working group to research, identify & plan approaches to Surrey based Trusts & Foundations.
 - Lead on Corporate Working group direction, research, identify & plan approaches to Surrey companies
- Plan & organise events (max 1-2 per year) with support from the Marketing & Events Managers.
- Lead on Professional Advisor work to maintain current relationships & develop new ones to engage and grow this network who refer individual clients to CFSurrey when they want to set up new funds.
- Attend external events, conferences and learning opportunities, occasional opportunities to speak in front of audiences about CFSurrey

Grants Programme

- Provide outreach to the voluntary sector through meetings, funding surgeries, workshops and site visits as required to support Grants team.
- Participate in internal grants meetings and funding processes.

- Review end-of-grant reports and support organisational learning.
- Provide sector intelligence to support grant-making strategy.
- Develop and maintain strong knowledge of community needs and funding priorities across Surrey.

Management responsibilities

- Line management of Fund Development Officer

OTHER DUTIES

- Undertake other duties as required to support the work of the Community Foundation for Surrey.

Equal Opportunities

- The Area Fund Development Manager will work within and conform to the Community Foundation for Surrey's policies including the equal opportunities policy.

Values

The Fund Development Manager will also conduct work in a manner which is consistent with the Community Foundation for Surrey's Values:

We focus on long-term strategic change to improve lives in our communities by collaborating with local donors and community organisations to enable positive and sustainable change.

We care deeply about our communities and donors, ensuring they are represented and included in all aspects of our operations.

We value expertise and continuously build our understanding of local needs through curiosity and research.

We are trusted by our partners, our funders and the people of Surrey to be accountable and independent.

We form empowering relationships based on fairness, equality, and transparency.

We are ambitious and ready to challenge, helping our partners have impact and our communities thrive through the value of our data, insight, and knowledge.

We focus our energy on building significant, sustainable funds for local communities.

The job description and priorities will be reviewed annually.

PERSON SPECIFICATION – FUND DEVELOPMENT MANAGER

Knowledge & Experience – Essential

- Demonstrable experience of income generation, relationship management and donor stewardship working with either Corporates or Trusts & Foundations – or both.
- Experience developing fundraising plans and strategy
- Knowledge of, or passion to learn about, issues affecting the voluntary and community sector in Surrey.
- Fully computer literate including Word, Excel, PowerPoint and CRM databases
- Strong organisational skills with the ability to plan and prioritise own workload to meet deadlines.
- A beady eye when it comes to details.
- A positive, ‘can do’ attitude.
- Able to work with a wide range of stakeholders: – Applicants for funding, prospective fund owners and Donors.
- Ability to assess and interpret complex data and communicate clearly through excellent written and verbal skills.
- Ability to manage a diverse workload and competing demands within a professional work environment.
- Able to work as part of a small team and able to make your own decisions.
- Line management experience.

Experience – Desirable but not essential

- Experience in a similar role such as Account Manager or Customer Relationship Manager.
- Familiarity with Professional advisors sector – legal, financial advice or wealth management.
- Experience using Salesforce/Plinth or similar CRM databases.
- Experience working with donors (High Net Worth individuals), philanthropists or fund holders
- Passion for supporting social change/charitable organisations in Surrey
- Interest and experience of working with communities in Surrey

Skills

- Ability to assess and interpret complex data and communicate clearly through excellent written and verbal skills;
- Ability to manage a diverse workload and competing demands within a professional work environment;
- Excellent personal skills and able to establish good interpersonal relationships, rapport and credibility with a wide range of people;
- Ability to relate equally to a wide range of volunteers, grassroots community organisations as well as larger charities, corporate organisations, Professional Advisors, donors and influential people;
- Strong interpersonal and relationship-building skills.
- Highly professional approach in a range of situations.

Personal Characteristics

- Enthusiasm to build a career within the charitable sector and highly motivated and enthusiastic to support community needs across Surrey;
- Committed to customer care and the provision of professional and high-quality services;
- Meticulous attention to detail and accuracy;
- Creative and flexible in outlook
- Pro-active team player who can help tell our story well.
- Excellent transferable people skills
- Committed to inclusion, diversity and community participation.

Additional Information

- The post may occasionally necessitate evening and weekend work for which time off in lieu will be provided.

Benefits

- Opportunity to contribute to meaningful causes and make a positive impact in the community.
- Collaborative and supportive work environment.
- Professional development opportunities to enhance skills and knowledge of not for profit.
- Fully flexible work arrangements including Time Off In Lieu and Volunteering days.