



Trust and Grants - Fundraising Officer - Job Description

Title	Trusts & Grants Fundraising Officer (Part time 0.8 FTE / 30 hours per week)
Employer	Lake District Calvert Trust
Reporting to	Head of Income Generation
Salary	£26,000-£32,000 pro rata / annum (subject to qualifications & experience)
Location	Little Crosthwaite, Keswick, Cumbria. CA12 4QD (with some home-based working by agreement)

WHAT WE DO:

The Lake District Calvert Trust is a charity that challenges disability through outdoor adventure, enriching lives through adventure building confidence and personal achievement, whilst enjoying the beautiful Lake District countryside. We have three centres that provide a range of services, located on the outskirts Keswick.

[Calvert Lakes](#)- provides fun-filled outdoor adventure for all, with our adapted equipment and specialist knowledge, offering an experience like no other to people with disabilities, their friends and family. Our highly trained team use experience and empathy to break down barriers and truly connect with people, creating a fun, inclusive environment that gives them confidence to try new things.

[Calvert Reconnections](#)- Acquired Brain Injury Neuro-rehabilitation centre based in the Lake District. Our unique evidence-based approach combines clinical therapy with vocational and outdoor activities to inspire and support people, so they maximise their potential.

[Calvert Lakes Riding Centre](#)– British Horse Society and Riding for the Disabled Association approved riding establishment, supporting both Calvert Lakes and Calvert Reconnections. Our dedicated team provide accessible riding and trap driving for residential and community riders and have found that horses (and instructors) provide a little bit of magic for our guests and participants.

The Lake District Calvert Trust is a relatively small charity, and our people go above and beyond to make a difference in people's lives. We are very proud of our achievements and we continue to strive to be the best place to work and volunteer.

These are the values that drive us:

- Flexible** - we **adapt** and **innovate**
- Ambitious** - we **stretch** ourselves and others
- Inspiring** - we **encourage** and **stimulate**
- Sensitive** - we **understand** and **empathise**
- Imaginative** - we see **beyond** the **obvious**

ABOUT THE ROLE:

The Income Generation team are an integral part of the Lake District Calvert Trust (LDCT), and the Trust and Grants Fundraising Officer role is essential to delivering the charities income targets and developing long term relationships. The post holder will support the Head of Income Generation with approaching, reporting, and maintaining Trust and Foundation relationships for major appeals.

The Trust and Grants Fundraising Officer will work as part of the Fundraising team, focussing on delivering income targets from trusts and foundations. The role is responsible for growing LDCT's trust and foundation income by increasing the amount and longevity of funding from current supporters, as well as building a portfolio of new trusts and foundations through research, maintaining a pipeline of prospects, updating the Funding Matrix and making successful applications. Building good relationships with new funders including regular reporting, as well as good stewardship of existing funders, is an important part of the role.

Key Accountabilities:

The key responsibilities of the Trusts & Grants Fundraising Officer are:

1. Delivering on fundraising priorities and targets for trusts and foundations income, including our current and future major appeals.
2. Researching, identifying, and prioritising appropriate trusts and foundations to maintain and convert a pipeline of new, prospective trusts and foundations.
3. Working with colleagues across the organisation to help shape projects for funding and creating strong Cases for Support to ensure effective applications.
4. Writing and submitting high quality targeted funding applications.
5. Maintaining an effective stewardship programme for trusts and foundations including appropriate accurate records, ensuring the fundraising e-Tapestry database is kept up-to-date and that fundraising income is processed efficiently with timely thank you letters and acknowledgements.
6. Managing relationships with existing and new funders to encourage maximum funding, multi-year funding awards and repeat funding.
7. Monitoring outcomes, updating the Funding Matrix and producing timely reports and information as required externally by funders and internally for Management reporting.
8. Promoting the support of funders through press releases and social media posts.
9. Adhering to standards of fundraising best practise as set out in the Institute of Fundraising's Code of Practise and ensuring all activities comply with relevant Data Protection obligations and any other legislation.
10. To undertake any other reasonable duties as requested by the Head of Income Generation

Health, Safety and Environment

- Act responsibly in relation to all matters which may affect the Health and Safety of yourselves and travelling between sites, and to always adhere to safety regulations
- Observe all safety procedures and instructions, and assist in maintaining a safe workplace and reporting any accidents, hazards, near misses, damages or defects to tools and equipment to the appropriate person
- Wear appropriate protective equipment (PPE) and use any safety devices provided by the Trust at the relevant times
- Report (and deal with, where relevant) any safety hazards, defects, near-misses or health and safety problems immediately

Person Specification

We are looking for a driven, enthusiastic individual to help realise our fundraising ambitions. You must have a genuine commitment to the voluntary sector and identify with our core values.

An understanding and empathy for working with people with disabilities and those working in the disability sector is essential. Disability Awareness Training will be provided upon commencing the post.

Requirements	Essential	Desirable
Qualifications & Experience	<ul style="list-style-type: none"> • Minimum of 2 year's relevant experience of Trust fundraising & a proven track record of achieving financial targets • Experience of working to challenging targets & deadlines • Excellent verbal & written English skills • Experience of research / report writing • Experience of writing successful grant applications 	<ul style="list-style-type: none"> • Experience of Major Appeal fundraising • Institute of Fundraising qualification and/or training • Experience of working for a charity • Experience of arranging funders PR events
Key Skills, Knowledge & Competencies	<ul style="list-style-type: none"> • Excellent interpersonal & communication skills through verbal & written channels • Excellent IT skills including the use of Microsoft Office /a fundraising database • Highly organised with the ability to plan & manage competing priorities • Commitment to accuracy & attention to detail • Understanding of key regulatory & legislative requirements in relation to fundraising, including GDPR 	<ul style="list-style-type: none"> • Understanding of issues faced by people with disabilities • Experience of using Blackbaud e-Tapestry database • Experience of social media, and other digital platforms
Personal Attributes	<ul style="list-style-type: none"> • Self-starter with the ability to work on own initiative & prioritise workloads • A creative & proactive approach to all areas of work with a 'can do' attitude • Strong team working focus with a flexible & adaptable approach to meet the demands across the whole organisation 	
Other	<ul style="list-style-type: none"> • Ability to work occasional evenings/weekends, attend out of hours meetings & travel. • A full driving license. 	

Contract: This position is permanent following a 6-month probationary period.

Hours: Part time 0.8 FTE (30 hours) per week, [hours can be worked flexibly across the week.](#)

Hybrid working pattern - when working in the office the hours are generally Mon–Fri, 09:00 to 17:00, with a 30-minute unpaid lunch break. Occasional evening and weekend work may be required. The role can include some home-based working and flexibility in days worked over the month by prior agreement with the Line Manager. Flexible working hours can be agreed after an initial 3-month familiarisation period.

Holidays: 33 days (pro rata) including Bank holidays (8 days), in accordance with Calvert Trust policy. Up to 10 days leave (pro rata) must be taken over the Christmas shut-down period.

Pension: The Trust operates an occupational pension scheme with defined contributions, the National Employment Savings Trust (NEST) and for eligible and non-eligible jobholders enrolled in the scheme both the employer and employee will make a contribution.

This post will be subject to checks with the Disclosure & Barring Service (DBS)

Other: