

Job Description



Summary

Job title	Trusts & Foundations Officer
Division	University Administration and Services
Department	Development Office
Location	University Offices, Wellington Square, Oxford OX1 2JD, but you may be able to agree a pattern of regular remote working with your line manager.
Grade and salary	Grade 7: £36,024 - £44,263 per annum, with discretionary range to £48,350
Hours	Full time (37.5 hours)
Contract type	Permanent
Reporting to	Head of Development – Foundations & Corporations
Vacancy reference	168878
Additional information	Applications are welcome and encouraged from all sectors of the community and are especially keen to encourage candidates from under-represented groups to apply. The Development Office is committed to equality and values diversity. <i>Subject to HMRC guidelines and the availability of funding, a relocation allowance may be offered</i>

Development Office

The role of the University's Development Office is to help secure philanthropic support for the University. The Development Office works in partnership with academic and development colleagues throughout the collegiate University to build enduring relationships with external constituencies – including alumni, non-alumni, corporate and foundation donors – and to increase financial support for agreed academic priorities.

In 2019, the University and the colleges completed the *Oxford Thinking Campaign*, which raised £3.34bn, and is the most successful fundraising campaign in higher education in Europe. The University is currently planning its next major campaign, and as a member of the Development Office, the post holder will have a key role to play in helping realise its successful delivery.

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In addition to fundraising staff, the Development Office has a number of teams that cover particular support functions. These include the Donor Relations team (which ensures that donors are thanked and the University's



Athena Swan
Silver Award



relationships with them appropriately stewarded); the Events team (which arranges high-level and bespoke events for donors and potential donors); the Research Team (which gathers information on potential and existing donors); the Development and Alumni Relations System (DARS) Support Centre (which supports the Development and Alumni Relations database); and the Communications team (which ensures that major and principal donors are made aware of the University's strategic fundraising priorities through tailored communications, including bespoke proposals and project information). It also works closely with the Gift Registry, part of the Finance Division, which records and processes donations received by the University and on behalf of colleges. There are also three overseas offices covering North America and Asia whose remit includes development; these offices are located in New York, Hong Kong and Tokyo.

For further information please visit: www.development.ox.ac.uk

The Development Office is committed to equality and values diversity. The Division holds a silver Athena Swan award to recognise advancement of gender equality: representation, progression and success for all.

The role

This is an exciting opportunity in the University of Oxford's Development Office fundraising for the University's wide-ranging priorities. Working closely with development colleagues and academic champions, as part of the six-person foundations and corporations team, you will raise philanthropic income from, and build enduring relationships with trusts and foundations, to enable the University to maximise its impact.

Key relationships: Head of Development – Foundations & Corporations; other members of the University Development Office; College Development Directors; and other academic and administrative staff as appropriate

Purpose: To meet the objectives outlined below and other key strategic fundraising priorities as identified by the University and be primarily required to attract and steward high-level trust and foundation support for funding opportunities within the collegiate University.

Working under the overall direction of the Head of Development – Foundations & Corporations, the post holder's main role is to raise gifts, typically in the range of £50,000 to £250,000, but up to £500,000, from the trusts and foundations sector for the University's agreed philanthropic priorities. The postholder is expected to submit 16+ applications to trusts and foundations and raise £500k+ *per annum*. In addition they will prospect manage and steward a number of the University's relationships with Trusts and Foundations, ensuring effective stewardship involving management of and the preparation and submission of donor reports.

In fundraising for projects it will be necessary to understand not only the other major sources of philanthropic funding (individual and corporate) but also the key sources of non-philanthropic funding for the University sector. The work will include the identification of major prospects and the pursuance of these with a view to raising financial support.

The post holder will recognise and embrace the value of adopting a collaborative and internally transparent approach to fundraising within the collegiate University structure. The post holder will work closely with colleagues in the Development Office, Oxford Colleges, University Administration and Divisions as well as academic colleagues to maximise gift potential from prospects who may have multiple connections and enthusiasms.

The post holder will join the Trust and Foundations team working alongside the Head of Development, two Senior Trusts and Foundations Officers, a Senior Development Executive – Corporations, a Development Officer – Trusts and Foundations and a Development Coordinator. The team is based in the Development Office where there are support services provided (which include accounting, database, research and proposal and report document production).

Key requirements for this post include an ability to plan and organise concurrent projects, work with professional and academic colleagues in the cultivation of prospects and in the solicitation of grants, and a talent for maintaining donor interest in the collegiate University.

The Pro-Vice-Chancellor – Development and External Affairs, the Chief Development Officer, the Executive Director of Development and the Head of Development – Foundations & Corporations are responsible for the solicitation of principal and many major gifts in support of the collegiate University. The Trusts and Foundations Officer will also be expected to develop a portfolio of prospects and be responsible for their identification, cultivation, solicitation and stewardship.

The post holder will be able to use the support services provided (accounting, database, communications, stewardship and research).

The line manager will regularly review progress. There will be opportunities for career development within the University Development structure. The office seeks to support and encourage staff to help them reach their potential, providing access to appropriate courses and training whenever possible, as well as a comprehensive induction process.

The work of the Development Office covers a wide range of activities and priorities which will inevitably change from day to day. All staff operate as a team, and, while each has their own responsibilities, they are expected to assist each other in peak periods. The post holder will need to become conversant with the University as a whole and especially with the numerous academic staff and volunteers and to travel to meet donors.

Development Office values

The following points lay down the foundations of the working ethos, culture and values of the Development Office. Aspirational and celebratory in turn, they provide a central framework for individual members of staff and teams, encouraging personal and professional growth.

- We value each other – We respect the professional expertise of our colleagues. An approachable, friendly and kind office, we work in an environment where transparency of action and clarity of intent create openness and trust.
- We work collaboratively – Whether within our own teams, across UODO, the collegiate University, or beyond, working collaboratively is second nature to us, and enables us to navigate complicated landscapes successfully.
- We go beyond – We prize working with a high degree of autonomy and trust, and deliver a wide range of projects to the very highest standards. We are committed to personal, professional development.
- We are part of something bigger – Our work supports the strategic priorities of the University of Oxford. We take pride in the contribution we – individually and collectively – make to the University.

Responsibilities

The duties of the post are set out as they are envisaged at present, but it will be important for the person appointed to be versatile and adaptable, and able to contribute to the development of the fundraising function of the collegiate University.

- To continue the successful work which has been done in obtaining grants for numerous University projects from trusts and foundations.
- With the Head of Development – Foundations & Corporations, to identify prospects with whom the University will aim to develop significant philanthropic relationships.

- To be able to understand academically complex projects and explain and promote them to potential, non-specialist donors. This will be undertaken in close collaboration with the relevant Head of Development and with senior fundraising personnel in the collegiate University both in Oxford and overseas (including the offices located in New York and Hong Kong).
- To become well acquainted with the needs of academic champions whose projects are priorities in the Development Office fundraising portfolio. It also requires the ability to spot potentially fruitful linkages between specific projects and the interests of prospective foundations and trusts.
- To work with the Head of Development – Foundations & Corporations to establish a strategy for approaching foundations and trusts which have not previously given to the University.
- To research background information on trusts, including charitable interests, giving levels, annual income, trustees, personal contacts, to identify potential links with key priority projects with the aim of securing a major gift.
- To understand donors' wishes and aspirations and to identify potential links with key priority projects with the aim of securing a grant.
- In conjunction with the relevant Head of Development and the Proposals Team, to make tailored applications to medium-sized and some larger trusts, ensuring that applications match the interests and giving potential of each trust in order to secure an optimal level of support.
- In conjunction with the Head of Development – Foundations & Corporations, to manage and develop good working relationships with current/potential trusts and ensure that support is appropriately recorded and recognised.
- To establish a good working relationship with administrative officers of trusts and foundations and to use their judgement, sometimes without reference, to determine what specific proposition should be put to a prospect, and under what terms, in order to best secure the prospect's greatest potential level of support.
- To be responsible for formulating and implementing stewardship strategies for all donors for which the post holder is the primary relationship manager. This will also include the arrangement of visits to projects and the submission of timely progress reports.
- To ensure that current and accurate trust contact details, income, application records, development strategy and activity for which the post holder is responsible is maintained on the Development Office's database, DARS.
- To contribute to regular activity reports for senior management.
- To optimise philanthropic support for the collegiate University and adhere to best practice in prospect cultivation, solicitation and stewardship. This will involve collaboration with College-based and other development staff in line with agreed principles and protocols.
- To promote and support best practice in trusts and foundations fundraising across the collegiate University by advising within the Development Office and the collegiate University on funding from the trusts and foundations sector, and by responding to incoming queries from trusts.
- To carry out such other functions as from time to time the Head of Development – Foundations & Corporations or the Executive Director of Development might require, commensurate with the level of the post, for example, the provision of clear and up-to-date briefing material on trusts and foundations donors.

Selection criteria

Essential selection criteria

To be assessed by application/cv

Experience and knowledge

- Proven fundraising and/or marketing experience and the capability of representing the University at the highest levels.
- An interest in higher education and in particular an understanding of the University of Oxford, and its goals in teaching and research.
- Excellent communication skills, both oral and written.
- A good general level of education

Skills and abilities

- An ability to think both strategically and tactically about the relations between potential donors and fundraising goals.
- The ability to plan strategically.
- An ability to ask for, or arrange for others to ask for, significant gifts to assist the collegiate University in maintaining its world-class status.
- The ability to promote interest amongst prospective donors in the goals of the collegiate University as a whole.
- The ability to work with professional and academic colleagues in the cultivation of prospects and in the solicitation of gifts.
- The ability to manage and develop relationships with donors and prospects; good listening skills are essential.

Attitudes

- Keen to pursue a career in fundraising.
- A passion for Higher Education.

Desirable selection criteria

- A degree or equivalent.

To be assessed by interview/exercise

Experience and knowledge

- An interest in higher education and in particular an understanding of the University of Oxford, and its goals in teaching and research.
- Excellent communication skills, both oral and written.

Skills and abilities

- The ability to promote interest amongst prospective donors in the goals of the collegiate University as a whole.
- Proven ability to identify and develop good working relationships with professional and academic colleagues in the cultivation of prospects and in the solicitation of gifts.

- An ability to act independently and decisively when the situation demands it.

Attitudes

- A combination of the personal sensitivity, creativity and tact that is needed when working with senior academics and prospective major donors to the University.
- The candidate must be adaptable in all senses and prepared to work out of regular hours and to travel.

Pre-employment screening

Standard checks

If you are offered the post, the offer will be subject to standard pre-employment checks. You will be asked to provide: proof of your right-to-work in the UK; proof of your identity; and (if we haven't done so already) we will contact the referees you have nominated. You will also be asked to complete a health declaration so that you can tell us about any health conditions or disabilities for which you may need us to make appropriate adjustments.

Please read the candidate notes on the University's pre-employment screening procedures at: <https://www.jobs.ox.ac.uk/pre-employment-checks>

Hazard-specific / Safety-critical duties

This job includes hazards or safety-critical activities. If you are offered the post, you will be asked to complete a health questionnaire which will be assessed by our Occupational Health Service, and the offer of employment will be subject a successful outcome of this assessment.

The hazards or safety-critical duties involved are as follows:

- Lone Working

About the University of Oxford

Welcome to the University of Oxford. We aim to lead the world in research and education for the benefit of society both in the UK and globally. Oxford's researchers engage with academic, commercial and cultural partners across the world to stimulate high-quality research and enable innovation through a broad range of social, policy and economic impacts.

We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, while providing all our staff with a welcoming and inclusive workplace that enables everyone to develop and do their best work. Recognising that diversity is our strength, vital for innovation and creativity, we aspire to build a truly diverse community which values and respects every individual's unique contribution.

While we have long traditions of scholarship, we are also forward-looking, creative and cutting-edge. Oxford is one of Europe's most entrepreneurial universities and we rank first in the UK for university spin-outs, and in recent years we have spun out 15-20 new companies every year. We are also recognised as leaders in support for social enterprise.

Join us and you will find a unique, democratic and international community, a great range of staff benefits and access to a vibrant array of cultural activities in the beautiful city of Oxford.

For more information, please visit www.ox.ac.uk/about/organisation.

We encourage applicants from all sectors of the community and are keen to encourage candidates from under-represented groups to apply. The University has a number of staff networks including the Oxford Research Staff Society, BME staff network, LGBT+ staff network and a disabled staff network. For more information about equality-related networks for staff and students, please visit <https://edu.admin.ox.ac.uk/networks#/>

How to apply

Applications are made through our online recruitment portal. Information about how to apply is available on our Jobs website <https://www.jobs.ox.ac.uk/how-to-apply>.

Your application will be judged solely on the basis of how you demonstrate that you meet the selection criteria stated in the job description.

As part of your application you will be asked to provide details of two referees and indicate whether we can contact them now.

You will be asked to upload a CV and a supporting statement. The supporting statement must explain how you meet each of the selection criteria for the post using examples of your skills and experience. This may include experience gained in employment, education, or during career breaks (such as time out to care for dependants).

Please upload all documents **as PDF files** with your name and the document type in the filename.

All applications must be received by **midday** UK time on the closing date stated in the online advertisement.

Information for priority candidates

A priority candidate is a University employee who is seeking redeployment because they have been advised that they are at risk of redundancy, or on grounds of ill-health/disability. Priority candidates are issued with a redeployment letter by their employing department(s).

If you are a priority candidate, please ensure that you attach your redeployment letter to your application (or email it to the contact address on the advert if the application form used for the vacancy does not allow attachments).

If you need help

Application FAQs, including technical troubleshooting advice is available at: <https://staff.web.ox.ac.uk/recruitment-support-faqs>

Non-technical questions about this job should be addressed to the recruiting department directly – *please email recruitment@devoff.ox.ac.uk*

To return to the online application at any stage, please go to: www.recruit.ox.ac.uk.

Please note that you will receive an automated email from our online recruitment portal to confirm receipt of your application. **Please check your spam/junk mail** if you do not receive this email.

Important information for candidates

Data Privacy

Please note that any personal data submitted to the University as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation. For further information, please see the University's Privacy Notice for Job Applicants at: <https://compliance.admin.ox.ac.uk/job-applicant-privacy-policy>. The University's Policy on Data Protection is available at: <https://compliance.admin.ox.ac.uk/data-protection-policy>.

The University's policy on retirement

The University operates an Employer Justified Retirement Age (EJRA) for very senior research posts at **grade RSIV/D35 and clinical equivalents E62 and E82**, which will be 30 September before the 70th birthday. The justification for this is explained at: <https://hr.admin.ox.ac.uk/the-ejra>.

For **existing** employees on these grades, any employment beyond the retirement age is subject to approval through the procedures: <https://hr.admin.ox.ac.uk/the-ejra>.

There is no normal or fixed age at which staff in posts at other grades have to retire. Staff at these grades may elect to retire in accordance with the rules of the applicable pension scheme, as may be amended from time to time.

Equality of opportunity

Entry into employment with the University and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each particular post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.

Benefits of working at the University

Employee benefits

University employees enjoy 38 days' paid holiday, generous pension schemes, travel discounts, and a variety of professional development opportunities. Our range of other employee benefits and discounts also includes free entry to the Botanic Gardens and University colleges, and discounts at University museums. See <https://hr.admin.ox.ac.uk/staff-benefits>

University Club and sports facilities

Membership of the University Club is free for all University staff. The University Club offers social, sporting, and hospitality facilities. Staff can also use the University Sports Centre on Iffley Road at discounted rates, including a fitness centre, powerlifting room, and swimming pool. See www.club.ox.ac.uk and <https://www.sport.ox.ac.uk/>.

Information for staff new to Oxford

If you are relocating to Oxfordshire from overseas or elsewhere in the UK, the University's Welcome Service website includes practical information about settling in the area, including advice on relocation, accommodation, and local schools. See <https://welcome.ox.ac.uk/>

There is also a visa loan scheme to cover the costs of UK visa applications for staff and their dependents. See <https://staffimmigration.admin.ox.ac.uk/visa-loan-scheme>

Family-friendly benefits

With one of the most generous family leave schemes in the Higher Education sector, and a range of flexible working options, Oxford aims to be a family-friendly employer. We also subscribe to the Work+Family Space, a service that provides practical advice and support for employees who have caring responsibilities. The service offers a free telephone advice line, and the ability to book emergency back-up care for children, adult dependents and elderly relatives. See <https://hr.admin.ox.ac.uk/my-family-care>

The University has excellent childcare services, including five University nurseries as well as University-supported places at many other private nurseries.

For full details, including how to apply and the costs, see <https://childcare.admin.ox.ac.uk/>

Disabled staff

We are committed to supporting members of staff with disabilities or long-term health conditions. For further details, including information about how to make contact, in confidence, with the University's Staff Disability Advisor, see <https://edu.admin.ox.ac.uk/disability-support>

Staff networks

The University has a number of staff networks including the Oxford Research Staff Society, BME staff network, LGBT+ staff network and a disabled staff network. You can find more information at <https://edu.admin.ox.ac.uk/networks>

The University of Oxford Newcomers' Club

The University of Oxford Newcomers' Club is an organisation run by volunteers that aims to assist the partners of new staff settle into Oxford, and provides them with an opportunity to meet people and make connections in the local area. See www.newcomers.ox.ac.uk.