

FUNDRAISING MANAGER



Candidate Pack

September 2026

CONTENTS

- 1** - Welcome
- 2** - About the Trust
- 8** - Governance and Management
- 10** - Strategic Aims
- 11** - Main Responsibilities of the Post
- 14** - Resources
- 15** - Person Specification and Terms of Appointment
- 18** - How to Apply
- 19** - Equality, Diversity and Inclusion



WELCOME

Dear Candidate

I am pleased to introduce this opportunity to join the South West Heritage Trust as its Fundraising Manager .

We are a heritage charity delivering major projects and programmes in Somerset and Devon. We work with people and communities within the two counties to improve life chances, build prosperity and create a better future. In all we do we seek to generate a strong return on investment.

This is the Trust's first dedicated fundraising post and represents a significant step change in our approach to generating charitable resources. You will bring a proven and successful track record of fundraising across a range of streams and will play a pivotal role in building capacity, momentum and confidence across the organisation. Working at pace, you will help the Trust significantly increase its charitable income and embed a sustainable, forward-thinking fundraising culture.

The Trust is a diverse and complex organisation which has become much more than the sum of its many parts. Building on our status as a National Portfolio Organisation funded by Arts Council England, our museums are now busier than ever and increasingly seek to reach people in new ways. Our archive services are nationally recognised and underpin high-profile public engagement and research. Our historic environment services ensure the protection and understanding of our rich inheritance of landscapes, archaeology and buildings. We are a charity with education at its heart and are also proud to deliver wide-ranging work with schools and young people.

We strongly believe in our combined identity as a charity and a heritage business, and that we will succeed through ambition, collaboration and an entrepreneurial spirit.

Sam Astill
Chief Executive Officer

ABOUT THE TRUST

The South West Heritage Trust was created in 2014 as an independent charity and limited company. It is dedicated to preserving and promoting the heritage of Somerset and Devon. We work with many partners, including the principal local authorities of the two counties, the National Lottery Heritage Fund, and Historic England to deliver wide-ranging heritage services. In 2023 we were proud to become a National Portfolio Organisation of Arts Council England. Every year we reach many thousands of people in a wide variety of ways.





Through our **Museums Service** we run three Accredited Museums – the Museum of Somerset and Somerset Military Museum in Taunton, and Somerset Rural Life Museum in Glastonbury.



Somerset Rural Life Museum Barn, textiles by the Somerset based textile artist Alice Kettle.

We manage the Brick and Tile Museum in Bridgwater and provide curatorial support to Weston-super-Mare's revitalised museum. Three million museum objects, ranging from geological, Iron Age and Roman collections to textiles and fine art, tell some of the many stories of Somerset and the South West. In partnership with the British Museum we also manage the Portable Antiquities Scheme in Devon, Somerset and Dorset.



photograph: Dr Lucy Shipley from PAS and Iain Sansome



We are the major custodians of written evidence about Somerset and Devon. Our Accredited **Archive and Local Studies Services** have centres in Taunton, Exeter and Barnstaple, where we care for over 10 million archives dating from the 8th century to the present day. 200,000 printed reference works about the South West are held in the Local Studies collections. We also run archive services on behalf of the unitary authorities of North Somerset and Torbay.





Our **Historic Environment Service** supports local authorities, partners and the public by offering planning-related advice and information about Somerset's archaeology and built heritage. We are also responsible for 450 acres of historic landscapes, including Cothelstone Hill in the Quantock Hills, Norton Fitzwarren Hillfort near Taunton, and Deer Leap in the Mendips.





Our **Learning Service** provides opportunities for people of all ages, including those with learning disabilities or affected by dementia. Up to 15,000 children participate each year in workshops for Key Stages 1 and 2. We make authentic heritage objects available to schools for use in the classroom. The service has never been busier.





Our organisational culture is one of working together as a single trust to provide a diversity of heritage services. To achieve this aim we rely on our remarkable staff and volunteers, our Friends organisations, our Supporters and partners, and all those who champion our work.



Our services are funded by core grants from Somerset Council and Devon County Council, by a wide range of contracts and by commercial activity. We also raise new income and attract grant investment from generous funders.

GOVERNANCE AND MANAGEMENT

Constitution

The South West Heritage Trust vested on 1 November 2014 as an independent company limited by guarantee with charitable status. Its charitable objects are:

- the advancement of education;
- the promotion of arts, heritage, culture and science including by the preservation and safeguarding of such land, buildings, structures, archaeology, objects, records or books as may be of historic or educational interest or significance; and
- to provide or assist in the provision of facilities in the interests of social welfare for recreation or other leisure-time occupation of individuals who have need of such facilities by reason of their youth, age, infirmity or disability, financial hardship or social circumstances, with the object of improving their conditions of life.

The Trust has heritage responsibilities previously carried out by Somerset Council (formerly Somerset County Council) comprising the Archives and Local Studies, Museums and Historic Environment Services, and by Devon County Council comprising the Archives and Local Studies Services. In addition, it has contracts to supply a range of heritage services to local authorities in Torbay, North Somerset, Weston-super-Mare and Bath & North East Somerset.

A subsidiary trading company, South West Heritage Trust Trading Company Ltd was also formed on 1 November 2014.



The Board of Trustees

The Board of Trustees has 12 members who meet quarterly to discuss the progress of the organisation and to agree its strategic direction. The Chief Executive (who is not a trustee) is appointed by the Board to manage the Trust from day to day.

There are three Trustee committees. The People Committee deals with strategic issues relating to human resources, terms and conditions, and pay. The Audience Engagement Committee deals with the strategic direction of marketing, PR and comms. It also acts as the Oversight Board in relation to the Trust's status as a National Portfolio Organisation. The Finance Committee monitors the Trust's financial stability and the progress made against the Business Plan.

The Leadership Team and the Staff

The Leadership Team meets formally on a monthly basis to ensure consistent and collaborative management of services and the delivery of the Business Plan. The Leadership Team currently consists of the Chief Executive, the Head of Somerset Archives and Local Studies, the Head of Devon Archives and Local Studies, the Head of Museums and Engagement, the Head of Historic Environment and Regulation, the Head of Development and Partnerships and the Head of Finance and Governance. There are some 100 staff (70 FTE) based at five main sites. A Staff Forum representing staff teams meets online every eight weeks to discuss staffing-related issues. We also depend fundamentally on the work and dedication of more than 100 volunteers.



STRATEGIC AIMS

Constitution

The Trust's five-year strategy, 2025-30, focuses on three major outcomes:

- Supporting People and Communities: We will support, empower and enrich people and communities.
- Protecting Our Heritage: We will preserve, protect and enhance heritage, keeping it safe and accessible now and in the future.
- Building a Thriving Trust: We will develop our identity as a leading regional charity and heritage business to increase our impact and drive our growth.

In achieving these outcomes we will be: inclusive; collaborative; professional; inspiring and responsible.



JOB DESCRIPTION

The Fundraising Manager **reports to** the Head of Development and Partnerships.

Job Purpose

- We are seeking to strengthen our fundraising capacity by appointing our first dedicated fundraising professional.
- This is an important step in developing the Trust's long-term financial sustainability and strengthening our identity as a charity.
- The Fundraising Manager will identify and secure funding from trusts and foundations, develop opportunities for individual giving and legacy support, and help establish the systems and culture required to support successful fundraising across the organisation.
- Working closely with colleagues across the Trust, the role will build a pipeline of funding opportunities to support exhibitions, learning programmes, collections work and wider strategic priorities.

Working Relationships

Internal: The postholder will work closely with Trust staff including curatorial teams, learning and engagement staff, senior managers and project leads to identify and develop funding opportunities.

External: Regular contact with trusts, foundations, donors, supporters, funding bodies and partner organisations.

Additional Information

Occasional evening and weekend work may be required, for which time off in lieu may be taken.

Travel between sites managed by the Trust will be required. The ability to travel independently will therefore be an advantage.

KEY RESPONSIBILITIES AND TASKS

The Fundraising Manager is **responsible for:**

Fundraising Strategy and Income Development

- Develop, implement and maintain a pipeline of funding opportunities from trusts and foundations aligned with the Trust's strategic priorities.
- Contribute to the development and delivery of a fundraising strategy that supports the Trust's long-term financial sustainability.
- Support the development and delivery of individual giving initiatives, including donations, regular giving and legacy fundraising.
- Contribute to the development and ongoing management of the Trust's membership schemes, helping to strengthen links between membership, donor development and long-term support.

Trusts, Foundations and Corporate Fundraising

- Research and identify prospective funders, preparing and submitting high-quality funding applications in collaboration with colleagues across the organisation.
- Manage relationships with grant funders, ensuring timely reporting, compliance with funding requirements and effective stewardship.
- Build and maintain strong relationships with corporate partners and sponsors, identifying opportunities for new partnerships and supporting the delivery of agreed benefits.

Project Development and Internal Collaboration

- Work with colleagues across the Trust to identify projects, programmes and initiatives that are suitable for external funding, supporting the development of clear and compelling cases for support.
- Work collaboratively with marketing and communications colleagues to support fundraising campaigns, donor communications and public engagement.
- Promote a culture of fundraising across the organisation, supporting colleagues to understand and contribute to fundraising activity.

Systems, Data and Performance Monitoring

- Establish and maintain effective systems and processes for managing fundraising activity, including the use of the various data systems used by the Trust.
- Collect, analyse and interpret fundraising and audience data to identify opportunities, track performance and inform decision making.
- Monitor and report on fundraising activity, including income secured, pipeline value and success rates, providing regular updates to senior management.

Reporting, Compliance and Best Practice

- Support the development of impact reporting, ensuring that outcomes are clearly articulated for funders, donors and stakeholders.
- Ensure all fundraising activity is compliant with relevant legislation, guidance and best practice.

Representation and Organisational Responsibilities

- Represent the Trust externally as required, including at meetings, events and networking opportunities.
- Follow and comply with all policies and procedures of the Trust including health & safety and security procedures.
- Uphold the charitable aims, working values and expectations of the South West Heritage Trust.
- Carry out other duties relevant to the post as reasonably required by the line manager.



TRUST RESOURCES

- A gross annual budget of c. £5 m and a variable capital budget.
- Up to 100 staff.
- The visitor-based and administrative sites managed by the Trust including the Devon Heritage Centre, the North Devon Record Office, the Somerset Heritage Centre, the Museum of Somerset and Somerset Rural Life Museum.
- 450 acres of landscape heritage sites.
- c. 3 m museum objects relating to Somerset and North Somerset.
- c. 10 m archives relating to Devon and Somerset, together with related local studies collections.
- The on-line Somerset Historic Environment Record containing information about more than 35,000 sites and monuments in Somerset and B&NES.



PERSON SPECIFICATION AND TERMS OF APPOINTMENT

Person Specification

Essentials

Desirables

Qualifications

Educated to degree level or equivalent relevant experience

Professional fundraising qualification or membership of a relevant professional body

Experience

Experience of fundraising within the charity sector.

Experience working in a heritage, museum or cultural organisation.

Experience researching and securing grants from trusts and foundations.

Experience developing individual giving programmes.

Experience preparing funding applications or proposals.

Experience of legacy fundraising.

Experience managing relationships with external stakeholders.

Experience of using CRM or donor management systems.

Skills/Knowledge

High level of written and verbal communication skills, including the ability to produce clear reports and present to stakeholders.

Experience preparing monitoring reports for funders.

Knowledge of UK heritage funding landscape.

Knowledge of the UK charity funding landscape.

Ability to develop persuasive funding applications.

Person Specification

Essentials

Desirables

Skills/Knowledge

Understanding of donor stewardship and supporter engagement.

Strong organisational, planning and coordination skills, with the ability to manage multiple priorities and meet deadlines.

Strong technical skills, and confident using data and information systems to support fundraising activity and donor development.

Commitment to the mission and values of the South West Heritage Trust.

Attributes

Proactive and solution-focused, with strong problem-solving skills.

Ability to work collaboratively as part of a team and independently when required.

Commitment to delivering high-quality outcomes and continuous improvement.

Passionate about the history and heritage of Somerset and the South West.

Terms of Appointment

Reports to: Fundraising Manager

Salary: £39,909

Hours: Full time 37 hours Monday to Friday. This role will be eligible for hybrid working. The postholder will be expected to be flexible to accommodate weekend and evening work as required.

Contract: Permanent contract

Location: Somerset Heritage Centre, Brunel Way, Norton Fitzwarren, Taunton, TA2 6SF.

It is expected that the post will be predominantly on-site based. There will be some flexibility for home working.

Annual Leave: 29 days per year exclusive of Bank Holidays

Notice: Three calendar months



HOW TO APPLY

To apply please complete a downloadable application form and email it in confidence to recruitment@swheritage.org.uk or send it by post (marked confidential) to:

Ann Bradford, HR and Governance Manager
South West Heritage Trust
Somerset Heritage Centre
Brunel Way
Norton Fitzwarren
Taunton
Somerset
TA2 6SF

CVs alone are not acceptable

All applications will be acknowledged. Interviews are intended to take place on Wednesday 11 October 2026

The closing date for applications is 9.00 am on Friday 30 October 2026

If you would like an informal conversation about the post, please contact Ann Bradford, HR and Governance Manager: 07961674134
ann.bradford@swheritage.org.uk

For further information about the South West Heritage Trust visit our website at www.swheritage.org.uk

For information about our trustees and management team see www.swheritage.org.uk/aboutus/governance/



EQUALITY, DIVERSITY AND INCLUSION

We are committed to building an organisation as diverse as the communities we serve. Your application for this role will be welcomed whatever your background and regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief, and marriage or civil partnership.

