



Trusts & Foundations Officer

Welcome



Thank you for your interest in this critical role for Turn2us. We are looking forward to hearing from people who share our deep commitment to supporting those who are facing financial shock in the UK. Your contribution will make a direct and tangible difference to people's lives, every day.

Since I started at Turn2us in March 2019, it has been a privilege to see the incredible work that Turn2us does. We support millions to change their lives for the better, every year. The level of organisational knowledge about our core business is extensive – we really know our stuff. And there is a very short distance between impulse and impact: the freedom to act in simple, pragmatic ways that are immediately helpful is a significant aspect of the rewards of working here.

Our overall ratio of investment to out turn is well above average. One good example is our Benefits Calculator, which costs around £350k per year to run. Used nearly 2.8m times in 2019/20, we believe that 232,000 claimants will have successfully secured an average income uplift of £5,320 if they continue to claim for a full year. That is a staggering £1.2 billion of previously unclaimed benefits going to where they were intended.

Of course, many of our activities are by their nature about people helping people, one individual or one family at a time – and we know that this work is amplified incredibly effectively by our strong partnerships with other charities and organisations working in local communities. A key priority for the future is to enable the organisation to understand how to do so, and devise a plan to maximise our impact with and for people and to tackle the system that fails so many of us.

Our culture is a very significant pull factor for people joining this organisation – how we are being, just as much as what we are doing. Our approach is infused with a sense of highly competent humility, facilitating and enabling colleagues, partners and crucially those for whom we exist to co-create solutions that work.

In the context of some important conversations taking place in our sector, I am unequivocal about our organisational commitment to Equity, Diversity & Inclusion, embedded in values and behaviours that enhance our working culture. An uncompromising personal commitment to working towards a fully diverse and inclusive working environment is essential for these roles, and comes ahead of other requirements.

The last year has been extremely challenging for people across the UK. The number of people in unpredictable employment, holding down several jobs to make ends meet, and the impact of Covid's lockdown has led to structural instability in many communities. The rapid rise in foodbank usage is a canary in the mine for fundamental problems ahead. So, working with partners, we have to grow our impact, and this recruitment is a major investment in the strength and capacity of our staff as we build a model that will take us confidently into the future.

Thomas Lawson,
Chief Executive Officer

From your hiring manager

Thank you for taking the time to consider this role at Turn2us, which will have a profound impact on our ability to secure funding to deliver programmes that support Turn2us' vision: that everyone in the UK has financial security so they can thrive.

We have a deep, committed and impatient drive to support people to build financial security equitably across the UK. We work alongside those who have experienced not having enough money to live on to help them cope with life-changing events. This can include job loss, losing a home, leaving a partner, illness or bereavement. We do this through providing cash grants directly and by giving people the tools they need to access benefits or other grant funds.

We also challenge the systems and perceptions that cause financial insecurity. The Coronavirus pandemic had a huge impact on the lives and incomes of millions of us in the UK. With many of us left struggling to keep our heads above water after losing our incomes, combined with the current cost of living crisis, there has never been a more significant period of economic disruption in most of our lifetimes. The social injustices that create inequalities across society are more apparent than ever – pushing people further into poverty and exclusion.

The vital work of Turn2us is partially enabled by income generated through fundraising, with funding received through Trust and Foundations making up a significant proportion of this revenue. Given the ongoing cost of living crisis, we need to continue our trajectory of income growth to meet the ever-increasing demand for our services, and this role will be critical in that development.

This pack provides information about our work, structure and our plans for the future. You will also find specific details on the skill requirements for this role and information on how to apply. We look forward to hearing from people who share our commitment and ambition for change for people living in financial hardship across the UK.

If you are excited at the opportunity to proactively secure income from Trust and Foundations so that we can achieve more impact for people facing financial hardship, as well as to build on your skills and experience as a vital part of our dynamic philanthropic fundraising team, we would love to hear from you.

We would love to hear from you.

India Brain,
Trusts and Foundations Manager

Financial security goes beyond survival

At Turn2us, we see every day how the right support at the right time can transform lives. It can mean having enough money to put food on the table and pay the bills, and the ability to thrive, not just survive. We all need financial security.

Financial security involves having enough money to comfortably cover your monthly expenses, save for your future and, most crucially, recover from financial shocks.

We want to see a society where everyone has the right to financial security. Our ambition to bring about this change forms the backbone of our strategy.

But it's not enough for Turn2us to demand change from a society and economic system at the root of so much financial insecurity for so many of us. We also need to model the change we and many other partners know is needed.

Our previous strategy, which focused on the financial shocks caused by life-changing events, enabled us to build strong foundations for our evolving ambition. We strengthened our safeguarding and sharpened our focus on equity, diversity, inclusion and belonging (EDIB).

We increased the reach and outcomes of our products and services by co-producing them with people with in-depth experience of the problems we were trying to address.

Over the last three years we have listened to and worked alongside individuals and families who have steered us towards an emphasis on financial security – empowering people to thrive, not just survive.

The growing scale of suffering compels us to increase our focus on challenging an outdated, unfair economic system.

Whilst overhauling the current system will not be straightforward, there is a growing desire across civil society, the commercial sector, and parts of the state to work together to change the status quo so that more people can work together to overcome financial shocks and rebuild the strength and resilience of their communities.

We will join forces with a wide range of partners, facilitating (with others) a broad coalition for change.

Over the next five years we will take steps towards that goal of designing a fairer economy, working both with UK-wide decision-makers and the people and families at the centre of communities driving change.

At Turn2us, we're well-placed to broaden our reach, deepen our impact and help drive the necessary change.

Join us in building a better future for us all.

Case studies

You can read more about the people accessing our services here:

[Alicia ↗](#)

[Fergus ↗](#)

Background reading

[JRF UK Poverty 2023 ↗](#)

[SMC Measuring Poverty 2019 ↗](#)

Further information

[View our Annual Report & Accounts 2021/2022 ↗](#)

[View our Strategy and Purpose ↗](#)

Job description

Trusts & Foundations Officer

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| Job title: | Trusts & Foundations Officer |
| Department: | Income Generation, Income & External Affairs Directorate |
| Reports to: | Trusts & Foundations Manager |
| Location: | Hybrid: Turn2us London Hub (Farringdon) & homeworking |
| Contract type: | Permanent, full-time |

Purpose of role

To identify opportunities to grow income from Charitable Trusts and Foundations, prepare and submit compelling funding applications and provide excellent stewardship to committed donors to solicit repeat grants. To support the Trust and Foundations Manager and wider Philanthropy Team with income generation activities as required.

Key responsibilities and accountabilities

1. Support with management of a portfolio of supporters and prospects to personally secure five figure grant funding.
2. Onboard new Trust and Foundations using a relationship management approach.
3. Build excellent relationships with staff across the charity to gather information to support the development of cases for support.
4. Support the Trust and Foundations Manager and Head of Philanthropy in the management of key funder and stakeholder relationships.
5. Maintain accurate data records and donor files.

Duties

1. **Support with management of a portfolio of supporters and prospects to personally secure five figure grant funding:**
 - Ensure that donors under stewardship are kept up to date on a regular basis and that their requirements are met.
 - Identify and onboard new donors using a relationship management approach.
 - Prepare persuasive funding proposals which articulate the value, impact and importance of Turn2us' work.
 - Facilitate strong relationships with donors and prospects to maximise financial support.
 - With support from the Trust and Foundations Manager, determine and execute cultivation, solicitation and stewardship strategies to move donors up the 'donor pyramid'.
2. **Build excellent relationships with staff across the charity to gather information to support the development of cases for support:**
 - Undertake research into newly created trusts and existing trusts which do not yet support Turn2us, seeking potential links with our work.
 - Make relevant and timely applications to potential new trust and foundation supporters.

3. Support the Trust and Foundations Manager and Head of Philanthropy in the management of key funder and stakeholder relationships:

- Write funding proposals, reports, and communications.
- Represent the department at meetings and events.

4. Adhere to internal processes and procedures for fundraising, reporting and information management across the Philanthropy Team:

- Ensure that the Trusts and Foundations Team's CRM records on the database and files are up to date.

5. Contribute to a supportive, high-performing, and collaborative working culture within the Directorate, with an emphasis on continual improvement:

- Work across the Directorate to add value and identify shared opportunities and collaborative approaches for income generation.
- Contribute to the development of process management tools and other resources leading to improved quality of funding approaches.
- Adhere to all charity organisation standards, policies and procedures.

EDIB:

- To implement the Equity, Diversity, Inclusion & Belonging policy into your daily activities wherever possible.

These are the normal duties, which the Charity requires from the position. However, it is necessary for all staff to be flexible and all employees will be required from time to time to perform other duties as may be required by the Charity for the efficient running of the charity. This Job Description is non-contractual. It will be reviewed from time to time and may be subject to change.

At Turn2us, we are committed to protecting personnel, children, adults, and service users from any harm arising from each other, themselves, our activities, or organisational failings whilst in contact with us. The post holder will be required to follow the safeguarding policy and will be responsible for integrating safeguarding into all aspects of their work.

The post holder will be expected to ensure that their work complies with contractual terms and conditions, the Charity's policies and procedures and key legislation, such as data protection and charity law.

Head of human resources Anna Docherty, and digital project manager David Swann, at a Turn2us workshop.



Person specification

Trusts & Foundations Officer

Skills

Necessary:

- Organisation skills, time management and multi-task skills.
- Written and verbal skills.
- Excellent communication (oral and written) and interpersonal skills with ability to deal with a diverse range of internal and external stakeholders.
- Customer service skills and passionate about quality of service.

Knowledge

Necessary:

- Knowledge of fundraising laws and regulations in relation to data protection and compliance.
- Knowledge of the Institute of Fundraising Code of Practice.
- Understanding of the current trends in grant making in the UK.

Desirable:

- Knowledge of the Trust and Foundations funding landscape.
- Knowledge of Trust and Foundation fundraising processes.

Experience

Necessary:

- Experience of Trust and Foundation Fundraising or knowledge of key processes.
- Experience of working with non-fundraising colleagues to strengthen fundraising activity.

Personal Attributes

Necessary:

- A team player with an ability to inspire, influence and engage positively.
- Manage a busy workload and diary, meet deadlines and performance targets.
- Ability to take a hands-on approach in a rapidly changing environment, adapting as necessary to carry out a range of tasks, ranging from administrative to strategic.

Turn2us is fully committed to equity, diversity and inclusion in our sector. We want this to be reflected in the diversity of the people who work for us and we are interested in applications from people from varied backgrounds.

How to apply

If you are interested in applying, please click on this [Link 7](#) which will take you to our Applied platform, which supports Turn2us to recruit people free of bias. As part of the application process, you will be asked to complete some questions which are linked to the requirements of the role. These will be blind-reviewed, and the scoring of these will determine whether you move forward in the process.

You will also be asked to submit personal details including diversity data. All diversity data will be treated as confidential. Those involved in the selection process will NOT have access to it. The information given by candidates will be solely used for the purpose of improving the recruitment process.

Turn2us is an equal opportunities employer and welcomes applications from members of all communities. It is committed to equality of opportunity, inclusion and diversity. We encourage and welcome applications from all parts of the community regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief and marriage and civil partnerships.

Turn2us particularly welcomes applications from those who have had experience of poverty themselves or of tackling poverty.

At Turn2us, we are committed to protecting personnel, children, adults, and service users from any harm arising from each other, themselves, our activities, or organisational failings whilst in contact with us. More information on our safeguarding policy can be found on our website.

Please let us know if you will require any reasonable adjustments should you be called for an interview.

Please note that all job offers are subject to 2 – 3 satisfactory references and a disclosure satisfactory to Turn2us from the Disclosure & Barring Service (DBS).

[Please read our privacy policy here.](#)

Noemi, Turn2us service user.



Interviews & Adjustments

What to expect from an interview at Turn2us



A first-round interview will typically last around 45 minutes, and will take place online, over Microsoft Teams.

We will send you a list of the interview panel members in advance, as well as a list of the areas that will be covered by the interview questions.

We'll ask you a set series of questions, and there will also be time at the end for you to ask us any questions you have about the role.

Some roles may also require a task to be completed in advance or during the interview; your interview confirmation email will provide all the details on this.

During the interview, it's fine to ask the panel to repeat a question, or to take a moment or two to think before answering.

We want you to feel comfortable as possible during the interview so please don't worry about your background interview space - we know this can be a challenge with remote working!

Second-round interviews take place in-person, either at the Turn2us London Hub or the Turn2us Edinburgh Hub. The second interview is meant to be an informal conversation between you and the interview panel to see if the fit is right on both ends, so we will not share interview questions in advance of this.

How to prepare for an interview



Make sure you have access to the internet, a working webcam, and a computer or headphones with a microphone.

Prepare well – read about the role you applied for and Turn2us before you sit down for your interview.

Consider how your values fit with Turn2us' purpose, and bring this to life in your answers.

Think of examples of when you've demonstrated the behaviour or skills needed for this role in a previous role or in your personal life.

Prepare any questions you have for the panel ahead of time.

Questions you ask the panel aren't scored as part of the interview so make sure you're asking questions that will help you decide whether the role is right for you.

Reasonable adjustments



If you are invited to an interview, and you have a disability or long-term health condition, please let us know if there is anything we can do or should have in mind to help you participate in the interview.

Please inform us of your reasonable adjustment needs when filling out your application, and/or if you are invited to a first interview.

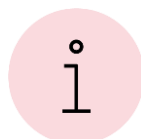
This information will be shared with the interview panel to ensure appropriate adjustments are made.

We're very happy to make adjustments to ensure any accessibility requirements are met.

Examples of reasonable adjustments we can provide include:

- Sending you this job pack in a Microsoft PowerPoint or Word format.
- Sending you the full interview questions in advance, instead of interview question areas.
- Copying the interview questions into the Microsoft Teams chat during your interview.
- Turning on captioning during your interview.
- Giving you more time to complete a task during your interview.
- Changing the interview location to accommodate accessibility needs.

Things to remember during the interview



Relax and take time to think about a question before you answer it.

Ask for clarification if you don't understand a question.

We won't ask you trick questions or try to 'catch you out'. All the questions we ask you will be relevant to the job.

If you have any technical problems during the interview, let us know.

If you cannot attend any of the offered interview slots, please let us know – please note we cannot guarantee we will be able to provide an alternative slot, but we will try our best to!

Staff Benefits

To read the full list of benefits of working at Turn2us, please visit the jobs page of our website [linked here ↗](#).

Annual Leave

- If you join us at Turn2us, you will start on 25 days annual leave per annum (pro-rata for part time workers). Each year on the month you joined, you will receive an additional day of leave up to a maximum of 30 days. On top of this you will receive bank holidays.

Volunteer Days

- The charity offers 2 volunteering days per year to allow staff to gain experiences and skills outside of work. Examples could include volunteering at a food bank, helping in a school or becoming a trustee at another organisation.

Employee Support

- Confidential counselling line provided through our employer's liability insurance policy with Ecclesiastical.

Flexible Working

- We offer flexible working patterns, both in terms of hours and remote working. Please note that all employees are required to work from the office a minimum of 4 days a month on a weekly basis. Some roles may be required to be in the office more often than this and this will be agreed with the hiring manager upon starting at Turn2us.

Commitment to diversity & inclusion

We welcome applications from anyone regardless of their age, experience, disability, ethnicity, heritage, sexuality, gender and socio-economic background. We particularly welcome applications from black, Asian, and minority ethnic candidates, disabled candidates and trans people, as these groups are underrepresented within our organisation.

Turn2us is deeply committed to inclusive working practices, so during the application process we commit to:

- Making any reasonable adjustments.
- Providing this job pack in a Word document format on request, for anyone who finds Word documents more accessible.
- Sharing interview questions or areas of discussion ahead of interviews.



Group head of IT Sophia Salem, and grant search product owner Christelle Tambi.

About Turn2us



Our vision

Everyone in the UK has financial security so that they can thrive.



Our purpose

We offer support to those of us facing financial shocks and together we challenge the systems and perceptions that cause financial insecurity.



Our values

Financial security for all

It's not acceptable to us that we live in an unjust society where a financial shock becoming a financial crisis is more likely for those already facing barriers to thriving.

Everyone should have access to appropriate rights, resources and support. We actively tackle prejudice and barriers to access.

We face into the causes of financial inequality, challenging the status quo, ourselves and others in doing so.

We believe this is urgent. We will not stand by as another generation grows up without adequate money and the resources to thrive.

Listen, learn and improve

To be effective, we need to deeply understand people's experiences, the financial challenges they face, what's important to them and how best we, and others, can provide support through a financial crisis or shock.

We are on a constant cycle of listening, learning and looking to improve. This gives us confidence in our direction. Listening attentively to people's lived experiences. Learning from all we hear and all we experience. Looking to improve how we support, respond and progress.

We hold ourselves to account and want to be held to account by those we work with and serve. Each and every one of us has our own worth and value. And it is in the spirit of humility and equality that we hear, learn and improve the most.

Together we succeed

We are successful when we collaborate, co-create, partner and work together.

Financial hardship can happen to anyone and for many reasons. Everyone's needs and situation are unique. We make no assumptions, no judgements.

Financial exclusion can be complex and complicated so we must work together with those we serve as well as other partners.

Impatient

We can't rest until financial security is achieved for all. To create change so that people can thrive we need to be proactive, take initiative, create momentum and drive forward with energy, determination and conviction. This sense of urgency is at the heart of our culture and all we do.

How we work

Our three strategic priorities:

Offer high quality information and support. We will be led by people experiencing financial insecurity, the communities we work with and our partners, and our improvement focused evaluation, to develop integrated services people need.

Strengthen communities through place-based programmes. We will develop existing programmes and start new ones, designed by and rooted in communities across the UK. Led by local organisations and people with experience of financial hardship, we will address financial insecurity and economic injustice together.

Help build a fair economy through systems change. Building on our data, insight and learning, we will campaign to build an economy that includes everyone and that we can all contribute to. We will work in partnership to create new systems that build financial security for all.

Our three guiding principles:

Championing equity, diversity, inclusion and belonging (EDIB). We know black, Asian and minoritised ethnic communities, disabled people, women and those from LGBTQIA+ communities, are more likely to experience financial hardship. Being inclusive and creating belonging will be central to the way we run our own organisation, as well as the way in which we design and offer our services.

Upholding human rights. No one should have to choose between heating their home or feeding their children. Our grantmaking, for example, addresses these wrongs and upholds people's rights.

Working for a fair journey to net zero economy. We will explore ways to support a transition to net zero in 2050 that protects people's employment and shares the benefits of a healthier, greener economy.

Our three organisational foundations:

Our culture. We will model the change we want to see across the UK. Our work will be rooted in partnership, respect, humility and mutual support.

Our finances. We will make the best possible use of our assets and investments and ensure they are on a thoroughly ethical footing. We will improve the returns from our care home business, Elizabeth Finn Homes.

Our brand. How we present ourselves and how we are experienced by everyone we meet is crucial for the delivery of this strategy. Our name – Turn2us – is both an invitation to people who need support, and a challenge to those in power, to listen to those voices of experience.

What we do

Turn2us is a national charity offering practical help to people facing financial insecurity. In 2024:



Over **2.5 million people** completed a Turn2us benefits calculation.



1.6 million of Turn2us Benefits Calculator users found new benefits to apply for.



Turn2us made grants worth over a total of **£3.3 million** for almost **2,277 people** in financial need across the UK.



Over **950,000 searches** were completed using the Turn2us Grants Search tool.



Our Helpline received over **80,500 enquiries** from people needing support to access our services and those of others.



The cost of financial insecurity



Half the people who came to Turn2us for support (according to a survey of more than 2,000 Turn2us service users, carried out between 15 June and 20 July 2022), reported being left with nothing to live on each week after paying housing, council tax and utility bills.

Nationally, nearly a quarter of people (**24%**) run out of money for essentials either most months or most days, according to a survey in February 2023 by Survation, on behalf of the [Together Through This Crisis Coalition](#) ↗, of which Turn2us is a member.



Since August 2021, the Consumer Price Index inflation rate has soared from **0.7%** to **10.1%** in January 2023, with gas prices rising by **129%** in the year to January 2023. [See the Office of National Statistics data on inflation.](#) ↗



Those most likely to report feeling worried about these rising costs are women (**81%** compared with **73%** of men); those aged 30 to 49 years (**82%**); people with disabilities (**82%** compared with **75%** of non disabled people) and those who have children under the age of five (**90%** compared with **76%** of non-parents). [See the Office of National Statistics to data on the cost of living.](#) ↗



In 2022, there were an estimated **3.26 million** households in fuel poverty in England, which is projected to continue to rise to over **3.5 million** in 2023. [See the governments statistics on Fuel Poverty.](#)



The demand for credit has risen sharply as people try to bridge the gap between their incomes and their needs. As a result, people in the UK owed **£1,832.8 billion** in personal debt at the end of December 2022, a figure up by **£72.3 billion** from the end of the previous year. [See The Money Charity on their 2023 statistics.](#) ↗



Poverty rates for minoritised ethnic groups have been consistently higher than for white ethnic groups over the past 25 years. Since 2000/2001, poverty rates amongst black people have remained around **40%**. This is twice as high as the poverty rate for the white ethnic group which has been around **20%** since 2003/04. [See the Joseph Roundtree Foundation on their poverty rate statistics.](#) ↗

Our timeline

1897

Elizabeth Finn founds the Distressed Gentlefolks' Aid Association at the age of 72.

1904

The charity receives its first legacy from founding Chairman, **Colonel William Knolly**, of £450, which is £40,000 today.

1948

Shortly after the Second World War, there's a shortage of care homes for older people.

The charity buys a home in Surrey as well as two other care homes the next year.

1965

The charity opens its first care home in the North of England, Hampden House, which was also the first purpose built care home in Harrogate.

1999

Times are changing. Following talks with supporters, the charity changes its name from the Distressed Gentlefolks' Aid Association to the Elizabeth Finn Trust in honour of our founder.

2007

The number of people coming to us for help is increasing so we create a new service called Turn2us.

The service sets up a website and helpline to help people in financial hardship to access welfare benefits, charitable grants and other financial help, and trains volunteers, advisers and caseworkers to help those who need further support.

2008

Elizabeth Finn Care wins the 2008 Third Sector **Award for Innovation in Grant Making**.

2009

Turn2us is formally reintegrated with its parent charity, Elizabeth Finn Care.

The Charity reaches a major landmark as it has given away a total of **£130,000,000** in direct grants since its foundation.

2010

Elizabeth Finn Care wins a competitive bid from the City of Edinburgh Council to consolidate **35 poverty-related funds** into The Edinburgh Trust, a charitable fund for the people of Edinburgh.

Our timeline

2011

The Turn2us service grows in size with over five million people in financial difficulty using the service – this includes **over 100,000 calls** to the helpline since its foundation.

2012

The Turn2us online service receives the accolade of a **Nominet Internet Award** for being one of the best online charity initiatives in the UK.

2012

The work of Elizabeth Finn Care continues to grow with over **350 volunteers** providing face-to-face support to those seeking our help.

2013

Turn2us launches a new **Benefits Calculator** to take into account the greatest ever overhaul of the benefits system.

2015

We integrate all of our activities under the name **Turn2us**.

This is to help us make the biggest impact we can for people experiencing tough times.

We continue to give direct grants to people and their families under the name Elizabeth Finn Fund and The Edinburgh Trust.

2017

Turn2us launches the Response Fund to help people who have had a life-changing event in the last 12 months that has left them struggling financially.

2020

The charity launches its new purpose and three year strategy.

This coincides with the coronavirus outbreak and subsequent lockdown, which we respond to by raising over £2.4 million and awarding a record **£1.3 million in crisis grants** within just three months.

2022

125th Anniversary of Turn2us.

2023

Launch of the new Turn2us 2023-28 strategy 'Tackling Financial Insecurity Together'.

Matthew's story

“We try and cut back where we can over the school holidays because we aren't able to afford to go anywhere. Sometimes it feels like we are failing our children because we can't afford to take them on days out when on paper we have 'good jobs'.”

Matthew,
Turn2us service user



Matthew, Turn2us service user.

We are a single income household, my wife is training to be a nurse and I am a recently qualified teacher, we have two children. Our rent has increased, gas and electric has gone through the roof, fuel costs for us to travel to work keep going up.

I never thought we'd be in this position but I got in touch with a Turn2us adviser who gave me the confidence to apply for more universal credit and showed me how to use the benefits calculator – and they also offered an understanding ear.

I think more people should speak up about their experience, so many people must feel alone just like we did. This is why I have been helping Turn2us with media interviews and telling our story in different ways, for example telling our family story as a graphic in The Big Issue.

Finding different platforms to speak about being in work and still struggling helps get the message across that anyone can struggle, it's not our fault, but there is help out there.

Contact us:

recruitment@turn2us.org.uk

www.turn2us.org.uk

