

JOB DESCRIPTION

Senior Trust & Foundation Specialist

Background | As a member of the Royal Osteoporosis Society team, your role exists to work with colleagues to ensure better bone health for everybody and help people to live well with osteoporosis.

Our vision | Strong and healthy bones for life.

Our purpose | We transform lives and society by leading the effort to improve bone health and defeat osteoporosis.

Our goals:

- To drive fracture prevention amongst people who are at high risk.
- Quicker diagnosis and better ongoing care, wherever people live.
- To support more people to live well with osteoporosis.

We have four guiding values:

We're Bold | We fearlessly stand up for and give a voice to people who need us.

We're Focused | We concentrate on where we can make the biggest difference.

We're Collaborative | We work as one team and embrace partners to change society together.

We have Integrity | You can trust us to do what we say we will.
We have eight supporting **beliefs** which guide every decision you make on behalf of the ROS and, in turn, the way we live our values.

We believe:

- We put our beneficiaries at the heart of everything we do
- In spending every £1 wisely
- We are the collective voice of people with osteoporosis
- We are the recognised experts in osteoporosis and bone health
- We have the knowledge and influence to change policy and healthcare systems
- Asking for money is vital
- We can achieve more together than on our own
- Everyone with osteoporosis should be able to live well and manage their conditions in ways that best meet their needs

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The Royal Osteoporosis Society (ROS) wants a future without osteoporosis. We are committed to helping keep the nation's bones stronger for longer and are the only UK-wide charity dedicated to improving the prevention, diagnosis and treatment of osteoporosis. The ROS relies on voluntary income to fund its vital work and trusts and foundations contribute a significant proportion of this funding.

To support our ambitious growth plans, we are seeking to grow and diversify income from trusts and foundations. This is a critical moment for ROS and we are looking for an exceptional Trusts & Foundations leader with the passion and skills to take this area to the next level.

The Role

The Senior Trust & Foundation Specialist is responsible for leading the growth and development of the Trusts and Foundations programme, to deliver significant and sustainable income growth to ensure ROS can deliver on our ambitious goals.

You will have lead responsibility for developing our relationships with existing and prospective institutional funders, especially those with the potential to give strategic multi-year grants. Working closely with our Services Team, you will identify and package up compelling projects that will attract funders. Providing leadership to the Trusts and Philanthropy Officer, you will oversee and ensure an excellent standard of cultivation, stewardship and reporting across the Trusts and Foundations portfolio.

The postholder is responsible for building a strong prospect pipeline, the development and delivery of a multi-year plan to achieve a range of funding applications including six and seven-figure grants and contracts. You will be line managing the Trusts and Philanthropy Officer who will focus on mid-lower level approaches, as well as supporting the Senior Philanthropy Specialist. You will be responsible for income budget and for monitoring and reporting on the Trust's income pipeline.

Duties and Responsibilities

- Lead the growth and development of the Trusts programme to deliver high value and sustainable income growth in line with organisational strategy.
- Build and maintain a qualified pipeline of prospects including cultivation plans for high-value opportunities.
- Identify and manage the cultivation of senior level volunteers who can make introductions and support applications to Trusts and Foundations.
- Assess the charity's ability to pursue statutory, contract and social return on investment funding, identifying opportunities and working with colleagues to shape and deliver bids.

- Oversee the process to identify and research funding prospects with potential to support the work of the charity. Match prospects to projects in line with the charity's new Funding Model.
- Work with colleagues across the organisation to identify projects and areas of work of interest to potential funders and develop attractive cases for support.
- Leadership of ROS's end-to-end bid/proposal-writing: liaising closely with colleagues; adapting insight and content for proposals, with associated full cost recovery budgets and supporting material.
- Work with colleagues to create and implement a horizon scanning and proposition matching process that aligns funding opportunities with short-, medium- and long-term plans, so that ROS has a range of programmes ready to match to funder interests.
- Leverage ROS's core case for support to create compelling applications that in a highly competitive and crowded market stand out from the crowd, for new and existing programmes.
- Oversee the recording, thanking and acknowledgment of all funding, ensuring all required reporting is delivered to the funder to meet specific deadlines, working across the organisation to ensure appropriate information is collected in good time.
- Lead on the development of a focused new stewardship and cultivation strategy, with new and existing funders including networking alongside the CEO, Directors, Trustees, and colleagues through regular communication, with the aim of optimising success rates and maximising the value and duration of support.
- Build strong proactive relationships with funders to seek insight and increase the chances of success and long-term retention
- Contribute to the development of a dynamic trust fundraising plan to meet agreed annual targets and secure sustainable income through repeat and multi-year grants.
- Work in partnership with colleagues to make the most of donor relationships where overlaps exist between personal philanthropy, and corporate partnerships or corporate foundations.
- Monitor income and expenditure against budget, maintain the rolling three-year trusts income pipeline and provide regular progress reports and updates on performance against target.
- Lead on the development of our prospect pipeline tracking and reporting via CRM, to better inform our reporting, forecasting and risk management.
- Understand AI and its appropriate use in the Trust sphere and utilise as a time saving tool.
- Maintain accurate records on the charity's CRM including all trust fundraising processes and procedures.
- Line-manage the Trusts & Philanthropy Officer, supporting their development and ensuring high quality outputs.
- Deputise for the Head of Partnerships and Philanthropy as appropriate.
- Undertake any other reasonable tasks as requested by senior managers.

Person Specification

Essential

Experience

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1. Demonstrable track record of leading the area of Trusts & Foundation's previously, generating six figure plus multi-year income
2. Demonstrable track record of working with senior volunteers in Trust & Foundation approaches.
3. Experience of building successful long-term cultivation plans.
4. Exceptional writing skills, with the ability to synthesise information from a range of sources and turn complex projects into clear and compelling cases for support.
5. Excellent project management skills, leading stakeholders across the organisation to deliver on our commitments to funders and supply high quality bids and reporting.
6. Evidence of developing compliance, monitoring & evaluation frameworks within funding propositions.
7. Demonstrable experience of developing and implementing successful pipeline and stewardship strategies to achieve significant strategic growth in income.
8. Target-driven and self-motivated, with the ability to prioritise own workload to meet targets and deadlines.
9. Strong interpersonal skills, with the ability to forge strong relationships with both funders and internal stakeholders.
10. Excellent organisation and administrative skills, with high standards of accuracy and attention to detail.
11. Confident in financial planning, forecasting and pipeline management.
12. Experience of working effectively with internal operational and project delivery teams to translate plans into proposals and monitor delivery against grant agreements.
13. Line management experience.

Skills

14. Analytical, insight-led approach to articulating charity programmes.
15. Strong influencing and communication skills with the ability to gain commitment from stakeholders at all levels both internally and externally to achieve objectives.
16. Excellent written and verbal presentation, with the ability to communicate a creative and compelling 'case for support' that can be tailored to different audiences.
17. Effective networker with a high level of interpersonal skills and a strong ability to negotiate, influence and present to a range of people and groups.
18. Excellent financial management and planning including reporting and analysis and understanding of treatment of restricted/unrestricted income and charity governance.
19. Excellent time-management skills.
20. IT proficiency to a self-supporting standard in Microsoft Office applications (MS 365 and ideally MS Dynamics).

Knowledge

21. Knowledge of the UK funding landscape, philanthropy and fundraising methods.

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22. Effective use of research to support pipeline management.
23. Appreciation of the use of technology and automation to support institutional funding.
24. Understanding of the Charities Act and regulator legislation relating to fundraising and tax effective giving.
25. An understanding of statutory funding (contracts and commissioning) and social return on investment.

Personal Attributes

26. A consummate team player able to engage with and manage a range of stakeholders.
27. An inquisitive planner that understands the role of data and insight within fundraising.
28. Strategic thinker with the ability to clearly articulate strong fundraising strategies.
29. Ability to drive the implementation and delivery of tactical plans to achieve objectives and financial targets.
30. Ability to motivate and inspire stakeholders, particularly funders.
31. Entrepreneurial approach to fundraising with the ability to identify and maximise opportunities and evolving funding models and practice.
32. A confident individual, who is able to prioritise their work and is target driven and solution focused.
33. Self-motivated and able to work effectively remotely.
34. Resilience, determination, enthusiasm and the ability to cope well under pressure.
35. Commitment to Equality, Diversity and Inclusion and strong personal attention to safeguarding and wellbeing.

The Royal Osteoporosis Society operates an Equal Opportunities Policy and does not discriminate on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality, and ethnic or national origin), religion or belief, sex (gender) and sexual orientation.