

# DIRECTOR OF FUNDRAISING, MARKETING & COMMUNICATIONS

*The*  
**MONEY**  
*Charity*

Appointment Brief  
February 2025





# WELCOME

HELLO,



Thank you for your interest in becoming our first Director of Fundraising, Marketing & Communications. We are so pleased you are considering applying.

This is a really exciting time to join The Money Charity as we launch our new 4 year strategy (2025-2028). We reach around 40,000 people a year, but our new strategy challenges us to double that. This role is key to us succeeding in our aims, and will be an amazing opportunity for the appointed individual to create new fundraising and communications and marketing strategies, and form the team. It is a crucial part of our Senior Management Team and will work closely with me and the other Directors, with regular exposure to the Trustee Board too.

This is the right role for you if you are a bold, inspiring and tenacious fundraiser or marketer. You understand our passion for seeing Financial Education and Financial Wellbeing enable lives and deliver happier, more confident individuals as a result. You will have the vision to create the fundraising and other strategies to underpin and deliver our ambitions.

Do get in touch if this sounds like something you would enjoy. We would love to hear from you. And good luck with your application if you do decide to pursue the opportunity. We hope you do!

Best,

*Michelle*

Michelle



**FOR OVER 30 YEARS, THE MONEY CHARITY  
HAS BEEN THE UK'S FINANCIAL CAPABILITY  
CHARITY AND OUR VISION IS THAT EVERYONE  
ACHIEVES FINANCIAL WELLBEING BY  
MANAGING THEIR MONEY WELL.**



# ABOUT US

For over 30 years, The Money Charity has been the UK's Financial Capability charity and our vision is that everyone achieves Financial Wellbeing by managing their money well.

We empower people across the UK to develop the skills, knowledge, attitudes and behaviours to make the most of their money throughout their lives; helping them achieve their goals and live a happier, more positive life as a result. By proactively providing education, information, advice and guidance to people of all ages and at all stages of life, we help them get to grips with their money and increase their Financial Wellbeing.

## OUR VALUES ARE FOUNDATIONAL TO EVERYTHING WE DO. WE ARE:

**Passionate.** We believe strongly in the difference made by what we do and seek to energise and inspire others.

**Committed to Quality.** If we do something, we do it well!

**Flexible.** Our 'can do' attitude means we endeavour to find solutions to meet varying needs.

**Engaging.** Our products and services are inviting, aspirational, inclusive and accessible.

**Non-Judgemental.** We never assume anything about anyone's capability, background or situation, and strive to create safe environments in which to share and learn.

**Open-Minded.** We are open to working with a variety of partners, even if required to be a 'critical friend'.



## YOUNG PEOPLE

We believe that our work with Young People has never been more vital. With growing awareness of the foundational importance of Financial Education, the spotlight is on the subject more than ever before.

At The Money Charity, we develop and deliver Financial Education Money Workshops and Resources for Young People and those who work with them. We believe that all Young People should grow up feeling confident that they have not just the skills and knowledge, but also the attitudes and behaviours they need to make the most of their money throughout their lives.

Our Financial Education Money Workshops are delivered face-to-face or virtually, to groups of Young People aged 7-19 across the UK. The majority of Workshops are in Schools and Colleges, but we also deliver to other organisations working with Young People, such as Charities and Community Groups. Since 2010, we have reached over 300,000 Young People through our Workshops. We make learning about money engaging, interactive and fun!

## ADULTS

In addition, our Financial Wellbeing Workshops and Webinars for adults, are a vital way for us to reach adults across the U.K. We deliver to groups of people in **Workplaces** or **Community** settings. This could be people who are refugees or immigrants, who are homeless, who have special educational needs or disabilities, and/or employees of the increasing numbers of organisations who recognise the need to support them with their Financial Wellbeing.

The tone of the sessions is upbeat and non-judgemental, making no assumptions about attendees' knowledge and ability. Most importantly, we are fully independent, impartial, and expert. Everyone attending will truly be empowered to make the best financial decisions for themselves and their families. We're proud to say that 95% of attendees said they would recommend us to others!







# EQUITY, DIVERSITY AND INCLUSION STATEMENT

The Money Charity values and actively strives to have a diverse and inclusive workforce in a working environment free from discrimination. An inclusive work culture where people of different backgrounds are valued equally ensures better outcomes for us all. We continually engage with our staff as well as external partners to help us to understand how we can make our workplace more inclusive and gain an insight into what our staff need most from us.

The Money Charity seeks to promote the principles of equality, diversity and inclusion in all its dealings with employees, workers, job applicants, clients, customers, suppliers, contractors, recruitment agencies and the public.



## STRATEGY

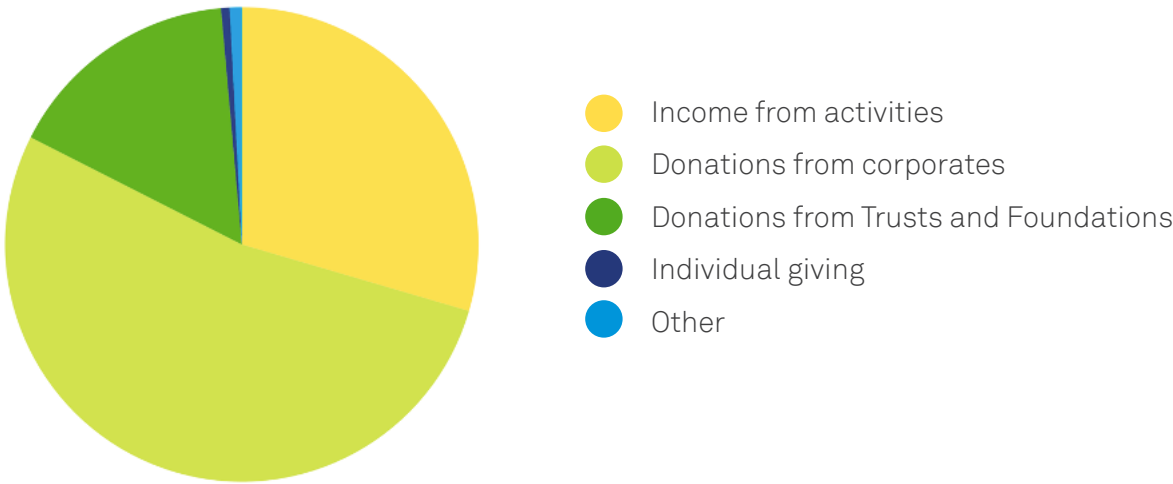
The Money Charity has recently reviewed its strategy and created a new 4 year strategic plan (2025 to 2028). Whilst we believe we are building from a position of strength, reaching more people than ever before with our quality and impactful interventions, we want to do more. We have set ourselves stretching growth targets to challenge ourselves to double the number of people we support by 2028.

Specifically, we will target doubling the number of young people reached and tripling the number of adults in the community reached through our workshops, whilst maintaining and innovating in our income generating workplace offering.

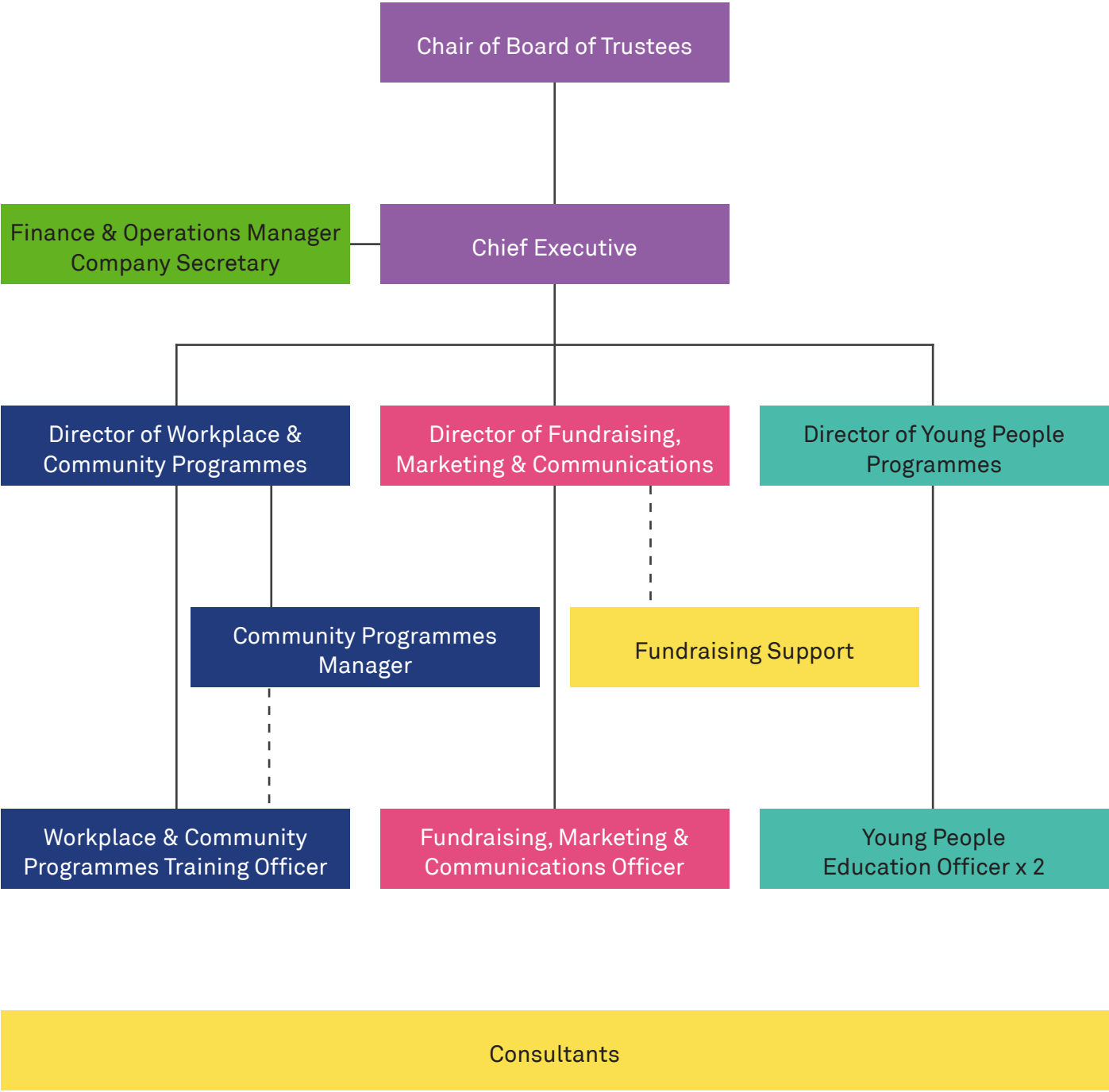
In order to do this, we need to raise significantly more income, doubling our current rate, and restructuring and refocusing on our fundraising, marketing, communications, business development and storytelling functions and abilities. This new role is the first step in that journey, and is a key hire for us, as the person will lead on generating the extra income needed to deliver our ambitious targets.

## FINANCES

We have rebuilt our income and reserves, following the disruption of 2020. The last three years our income has remained stable around the £700,000 mark. In 2024 our income totalled £663,000 and we made an unrestricted profit of £37,000 taking our reserves up to £193,000 which is just over 4 months running costs.



# ORGANISATION CHART



# ROLE DESCRIPTION

<b>JOB TITLE:</b>	Director of Fundraising, Marketing & Communications
<b>SALARY:</b>	£55,000 - £60,000 FTE, Part time considered
<b>LOCATION:</b>	Clapham / Hybrid working (2 days in the office)
<b>REPORTING TO:</b>	Chief Executive
<b>DIRECT REPORTS:</b>	Fundraising, Marketing & Communications Officer and outsourced fundraising support

In 2025 we will be launching a new multi-year Charity strategy, and this is a brand new role with a key part to play in enabling the planned growth in the charity in the coming years.

As a member of the Senior Management Team the post holder has a crucial role in supporting the charity in meeting its strategic objectives.

Specifically they will develop, implement and integrate new fundraising, development and communication strategies and hire appropriately into their team at Officer level to support. Enabling us to better tell our story, significantly increase net income and ultimately reach many more individuals, making a real difference to the lives of young people and adults as a result.

We are looking for an experienced leader who brings a demonstrable track record of senior level success in a number of the following fields: fundraising, business/charity development, communications, and marketing. They should be both strategic and hands on with a passion for charity development and advocacy.

This role is pivotal to the fundraising and development activities of the charity as it enters a new chapter. Reporting directly to the Chief Executive you will sit firmly on the top team. You will have the opportunity to develop this role and team as your own and work with an established senior team, highly engaged Board of Trustees and committed staff to grow the charity.

This is a fantastic opportunity for a professional who believes that fundraising and communications are about facilitating change and empowering people to make a difference to their own lives and future generations.



# KEY RESPONSIBILITIES

- To create and drive the charity's fundraising and business development strategies to ensure that The Money Charity undertakes the most appropriate activities to maximise income and therefore delivery, reach and impact.
- To set the annual fundraising and income goals, in partnership with the CEO and Board, and to ensure that they are met or exceeded.
- To create and drive the charity's communications and marketing strategies ensuring we are telling our story in the most powerful and effective way, demonstrating impact and differentiating the work of the charity from other organisations working in a similar field.
- To be responsible for the charity's website and social media presence.
- To develop and maintain strong and effective relationships with trusts, foundations, companies, major donors, funding bodies and other partners to grow income, retain and deepen relationships, and demonstrate the impact of funding or partnering with The Money Charity.
- To work with colleagues across the charity to assess funding and business development needs and to ensure that colleagues understand and deliver on requirements.
- To work with colleagues to ensure a steady flow of projects that can be packaged for all the fundraising and income generating audiences.
- To create a donor/customer-centric culture whereby all staff understand different customer/donor journeys and proactively look for ways to maximise loyalty and value.



- To manage the Fundraising, Marketing & Communications Officer and an associated team budget.
- To manage any outsourced fundraising and communications relationships (currently the website; and trust and foundation fundraising).
- To represent The Money Charity at events and meetings as necessary.
- To participate in the corporate life of The Money Charity.

# PERSON SPECIFICATION

## ESSENTIAL:

- Substantial track record of two or more of the following at a senior level: fundraising, corporate partnership building, business development, communications, marketing.
- Experience of digital marketing, website, and social media.
- Demonstrable evidence of hitting income and fundraising targets.
- Experience of advocacy and storytelling
- Ability to deal with senior level contacts both internally and externally.
- Proven communication skills including confidence at public speaking with the ability to enthuse and motivate.
- Excellent written skills, including the ability to compose, edit and proofread.
- Exceptional organisational skills with impressive attention to detail and ability to prioritise and maintain accuracy under pressure.
- Excellent financial management skills including the ability to maintain accurate budgets and forecasts.
- Understanding of how to attract positive PR. Confidence with engaging with the media.
- Highly motivated, proactive and driven.
- Experience in managing or leading people.

## DESIRABLE:

- A good understanding of issues relating to money management and Financial Capability.
- Ability to work with MS Word, Excel and PowerPoint.
- Comfortable working with a variety of systems and online platforms including HubSpot or other CRM systems, G-Suite, Microsoft Teams.
- Educated to degree level.
- Passionate about the cause; keen to work with people and empower them to be financially capable.
- Previous experience of being a member of a Senior Management Team.
- Charity/not-profit experience.





# BENEFITS

- 36 days holiday (including bank holidays and 3 further days between Christmas and New Year). Pro rated if part time.
- Additional Flexible annual leave purchase options available.
- Progressive culture with comprehensive flexible working policy, where flexible working hours and 'work from anywhere' fully supported and encouraged.
- Living Pension employer with generous 10% employer pension contribution after probationary period.
- Cash Health Plan including access to counsellors and GPs.
- Enhanced maternity, paternity and adoption pay.
- Discretionary annual bonus.
- Living Wage employer.



# HOW TO APPLY

To apply to become Director of Fundraising, Marketing & Communications, please send the following documents to [jobs@themoneycharity.org.uk](mailto:jobs@themoneycharity.org.uk):

- Your CV, drawing out relevant experience for the role.
- A supporting statement of up to 1,000 words that addresses the criteria set out in the person specification as well as your interest in the organisation's work.

Please ensure that you have included a telephone number, as well as any dates when you will not be available or might have difficulty with the recruitment timetable.

# RECRUITMENT TIMETABLE

Deadline for applications:  
19th March

First round interviews:  
likely to be week of the 30th March

# QUERIES

If you wish to have an informal discussion about the opportunity, before application, please email [michelle@themoneycharity.org.uk](mailto:michelle@themoneycharity.org.uk).



15 Prescott Place  
London  
SW4 6BS  
020 7062 8933  
Registered Charity Number 1106941

The  
**MONEY**  
Charity

## Money Personality Quiz

1. Do you know how much money you have in your wallet and/or bank account?
- A. Yes, exactly
  - B. I could have a vague guess
  - C. No idea

2. Do you know how much money you have coming in each week/month?
- A. Yes, exactly
  - B. I could have a vague guess
  - C. No idea



3. By the end of the week/month, I have...
- A. Money left over for saving
  - B. Spent more than I probably should have
  - C. No idea how much I have spent

4. If I had a spare £10,000, I would...
- A. Save it for a rainy day
  - B. Pay off any debt and invest
  - C. Blow it all

5. If I lost my job, I could manage...
- A. 6 months
  - B. A couple of months
  - C. A couple of weeks

