



Candidate Briefing Document  
Head of Membership & Marketing  
Charity Finance Group (CFG)



## Welcome Letter from Our Chief Executive

Dear applicant,

Thank you for your interest in this role. I hope that what you find within this brief will excite you and, if you like what you read, entice you to apply for this position.

This role will work at the heart of CFG and demands a real team player with leadership qualities. It's really important to us that you share our vision of what leadership is all about. So what makes a good leader?

To me leadership is a term, much like 'strategy', that is misused and misunderstood. Being a leader isn't about being the CEO (or other senior title), hierarchy, control or having all the answers. Yet leaders can have a hard time breaking out of the traditional concepts of leadership and embracing a different approach. Some of that pressure comes from measuring success solely on outputs and results rather than how they are achieved. Whilst quality outputs are essential, how something is done will not only say a lot about an organisation, its values and purpose it can, if mishandled, directly undermine effectiveness and sustainability.

A brilliant working environment and great leadership can have a transformational effect on the impact of an organisation. Conversely failing to nurture staff, empower and engage them and foster great leadership skills can undermine even the best of employees!

I believe that leadership and ownership should come from all levels. I give to my team, and expect from them, their whole self. We spend so much time at work it should be as fulfilling and enriching as possible - and I just don't think that is possible if individuals are not encouraged to be themselves and play to their strengths.

We're looking for a Head of Membership and Marketing to lead our membership and marketing teams to ensure that our membership scheme is member needs driven and delivers growth in our charity and corporate member numbers (as growth is pivotal to delivering our charitable objects sustainably).

I am confident that you will get so much out of your time with us.

Warm wishes,

Caron Bradshaw



Chief Executive

# Head of Membership & Marketing

**Reports to:** Director of Commercial Services

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**Salary:** £42,840 - £44,880

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**Hours:** Full-Time

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**Duration:** Permanent

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## About CFG

CFG is a charity that supports all charities and social change organisations to make the biggest difference possible. We do this by supporting them to make the most of their money and resources, by putting financial leadership at the heart of their decisions.

We strive to upskill the sector, and are working to create a more supportive operating environment; connecting experts from across different sectors and maximising the impact organisations can have in effecting social change. If you want to know more about how we do this, visit our website at [www.cfg.org.uk](http://www.cfg.org.uk).

## Our values

Our values define who we are as people and who we are together as CFG. The work we do is important and how we do it is just as important to us. We work on the basis people can be taught skills and gain experience so we want to know if you share our values and beliefs. The CFG team worked together to create values that they believe embody who they are as individuals and how they want to work together as a team to achieve CFG's goals.

We are:

- Aspirational, and brave
- Emotionally authentic, vulnerable and considerate
- Innovative and creative
- Accountable and trustworthy
- Collaborative and supportive
- Active and continuously improving
- Adaptive and resilient

## Key Skills

The post holder will be a membership and marketing enthusiast with a commercial brain, the ability to understand and identify member need and be completely at ease in the digital environment. You will have CRM knowledge and the ability to ensure systems are developed to meet organisational need.

You will be comfortable analysing data and able to draw insights from market intelligence and member feedback. You will strike a superb balance between commerciality and service provision so that our offerings are tailored, sustainable and effective; leading the team and providing expertise. Your leadership style will ensure that the team are supported and motivated to be the very best, achieve the seemingly impossible without stifling growth or micro-managing.

## **The essentials – You will:**

- Be an excellent communicator able to liaise with a variety of stakeholders across different sizes and disciplines of social change organisation,
- Be an exceptional leader of people, seeking opportunities and driving performance through motivating and supporting your team,
- Be solutions focussed and seek out ways to improve processes in the team,
- Be a team player and work seamlessly with the wider organisation,
- Be open, approachable and a firm believer in continuous development.

## **Demonstrate CFG values by;**

- Bringing your whole self to work when working with colleagues and external partners, being open and honest;
- Being open minded and happy to embrace change;
- Motivating others and demonstrating enthusiasm about the impact we can have;
- Working hard to exceed expectations and ask for help when needed;
- Collaborating with colleagues and actively sharing knowledge;
- Giving feedback constructively;
- Being resilient and readily willing to adapt to an ever changing environment.

## **Specific leadership Responsibilities**

### **Membership scheme**

- Ensure that CFG's membership scheme is appropriate and that the fee structure and commensurate level of benefits offered reflect the needs of the market.
- Ensure that CFG's member services and benefits continue to be relevant and useful to CFG audiences and are effectively promoted to both members and the non-member audience.
- Lead the team to drive up levels of 'customer service' across CFG ensuring all internal staff are trained and equipped to align with the standards of customer experience required in the CFG member journey.
- Lead the team to continuously deliver improvements in customer experience and value through developing and implementing effective evaluation and quality control processes.
- Support the partnerships team to actively source new benefits from CFG's subscribers to maximise, for members, the value of corporate support.
- Where appropriate, with the partnerships team develop partnership and collaboration opportunities with other relevant not-for-profit groups/organisations in order to expand the range of CFG services provided and to reach the wider market.
- Oversee the management of the sub-sector specific and tailored offerings of Special Interest Groups, bulk partnerships etc (spotting opportunities for further tailoring and implementing mechanisms for effectively supporting sub-sectors and regions) and work to maximise member engagement.

### **Information, insight and data**

- Ensure that member data is accurately maintained, renewal and retention campaigns undertaken in a timely and effective manner. Drive up levels of 'customer service' across CFG.
- Support the membership team and wider CFG staff team to understand information drawn from multiple sources and form insights regarding market trends, member behaviour, opportunities for growth and member need. Particularly with a view to ensuring CFG's

activities and approach in a digital environment are effective.

- With the IT and database Manager, ensure that CFG's database is developed and managed in order to meet the information needs and support the work of the wider organisation; reporting on and analysing member profile data to inform and support the broader work of CFG.
- With the Communications Manager and Digital Coordinator, ensure that CFG's communication channels meet the needs of members and remain relevant and accessible in order to maximise opportunities for member engagement.
- Support the development and implementation of an integrated communications approach so that internal and external values and communications work in harmony
- Ensure the effective dissemination of information to members through all available channels/media.

### **Marketing and member engagement**

Ensure consistent expression externally of CFG brand and positioning

- Lead on putting member value at the heart of decision-making within the organisation
- Increase CFG's engagement with non-member audiences
- Develop internal understanding of the brand and brand values and ensuring a consistent tone of voice
- To oversee the management of relationships with marketing, design and market research agencies engaged by CFG
- Support the marketing team with expertise on design and creative direction for campaigns.
- Oversee an effective marketing team to develop and optimise relevant events marketing and member strategies ensuring delivery of sustainable income (from all products and services), overseeing and supporting end to end campaigns in the team
- Lead the development and implementation of effective marketing/membership recruitment and retention strategies to drive member engagement and growth in reach.
- Lead the development and implementation of effective marketing/events and training strategies to ensure our professional development programmes are sustainable.

### **Additional responsibilities**

- Support the development of cross-function working taking the lead where appropriate.
- Represent CFG at events and attend external events where appropriate.
- Support budget holders with planning, management and forecasting.
- At all times, work pro-actively to promote CFG's equal opportunities policies, both in respect of service delivery and employment issues; and to ensure the health, safety and welfare of the post holder, colleagues, members and visitors.
- Cover for colleagues when necessary.
- Other such duties as shall be required as part of a collaborative staff team

## Person Specification

	<b>Essential</b>	<b>Highly Desirable</b>
Qualifications	<ul style="list-style-type: none"> <li>▪ Excellent standard of education which may be illustrated through degree qualification or through other routes</li> <li>▪ CIM qualification or significant relevant experience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Education a relevant topic (marketing, business etc)</li> </ul>
Experience	<ul style="list-style-type: none"> <li>▪ Proven track record in managing a membership scheme and growing member numbers.</li> <li>▪ Proven track record of commercial skills.</li> <li>▪ Experience of leading a team, particularly of leading the personal development and growth of others.</li> <li>▪ Experience of development and implementation of a brand strategy</li> </ul>	<ul style="list-style-type: none"> <li>▪ Experience of working in a not-for-profit organisation in a membership role</li> <li>▪ Experience of organisation providing events, training and information services.</li> <li>▪ Chartered marketer or other marketing qualification</li> </ul>
Knowledge/ Understanding	<ul style="list-style-type: none"> <li>▪ Experience delivering on large income targets</li> <li>▪ At least intermediate level use of Microsoft Office</li> <li>▪ Knowledge and experience of membership organisations.</li> <li>▪ Knowledge and experience of managing a marketing function</li> </ul>	<ul style="list-style-type: none"> <li>▪ Knowledge of charity finance</li> <li>▪ Knowledge and understanding of financial management</li> <li>▪ Knowledge of finance roles and functions</li> </ul>
Skills/ Abilities	<ul style="list-style-type: none"> <li>▪ Ability to relate to people at all levels</li> <li>▪ Excellent communication, negotiating and influencing skills</li> <li>▪ Organisational, planning and time management skills</li> <li>▪ Ability to coach people and give constructive feedback</li> <li>▪ Confident presentation skills</li> <li>▪ Ability to write reports, keep records, and work within budgets</li> <li>▪ Excellent command of English language both written and verbal</li> <li>▪ Exceptional attention to detail</li> <li>▪ Self-starter, able to use own initiative</li> <li>▪ Ability to work collaboratively and flexibly across a small staff team</li> </ul>	
Other	Willingness to travel and work outside normal office hours occasionally	