



Candidate Briefing Document  
Marketing Officer  
Charity Finance Group (CFG)



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## 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 may have no current line management responsibilities but it 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 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.

Leadership is all about the positive power of relationships. It is about emotional and personal factors. It's about valuing your colleagues and bringing the best out of them. It's about helping them unlock something inside them that maybe they didn't know was there. It's about passion, love, purpose and vision but also humility, humour and fun. It's about cultivating the courage to be emotionally honest, to set boundaries and allow ourselves to be vulnerable.

We're looking for a Marketing Officer to support the delivery of our ambitious marketing plans. If you look at the activities associated with this role and think 'I haven't done all of that before' - don't worry. If you understand the importance of building relationships, can manage a busy variable workload, we'd still love to hear from you. We can support your learning and growth - it's what we like to do!

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

Warm wishes,

Caron Bradshaw  
Chief Executive Officer



## About Us

At CFG, our vision is to inspire a financially confident, dynamic and trustworthy sector. Everything we do is led by our goal to enable charities to deliver more impact to their causes.

It's our mission to put finance at the heart of social change organisations, making their money work harder and achieve the maximum positive outcome for their beneficiaries. Our members include over 1,400 charities, social change and public benefit organisations, all working hard to improve the lives and outcomes for their beneficiaries – often on a tight budget.

Through improving their financial management, governance and leadership, we can help these organisations deliver their charitable objectives from all the resources available to them.

## Who we work with

We work closely with finance professionals and those in governance roles, but we believe better financial management also benefits a much broader audience. This is reflected through our wide-ranging work with non-finance professionals, members of the public, government, corporates, foundations, regulators and many more.

We strive to develop finance skills in all leaders – whatever their discipline – and help to build leadership qualities across the whole sector, truly putting finance at the heart of informed decision making. Charities and social change organisations turn to our membership resources, helplines and publications for essential financial know-how, and our extensive programme of events and training; brings finance skills to all leaders, whatever their discipline.

We are keen to work with all charity professionals, no matter what stage of their professional career they may be at. Those at entry level can benefit from the many opportunities to grow their network and improve their skills, while the more experienced can lend their expertise and pass on their hard-earned knowledge.

We'd like to see a sector that embraces the knowledge and wisdom of all professionals and recognises the value that volunteers can bring. As an associate (or affiliate), members can stay connected and continue supporting the sector, through the wealth of experience they bring to the CFG community.

# Marketing Officer

<b>Department:</b>	Policy & Engagement
<b>Reports to:</b>	Head of Marketing & Communications
<b>Salary:</b>	£26,780
<b>Hours:</b>	35 hours per week, Monday to Friday
<b>Duration:</b>	Fixed term, 6 months

## About CFG

The purpose of Charity Finance Group (CFG) is to develop a financially-confident, dynamic and trustworthy charity sector.

Our 1,400+ members are charity finance professionals, who between them manage £21bn of funds. We work with our members to: inspire and nurture leadership; drive up standards; create a better and fairer operating environment; identify best practice and share knowledge.

Ultimately, we strive to equip charities with the knowledge, skills and conditions they need to ensure that every pound works even harder, achieving a greater impact for even more beneficiaries.

## Our values

We believe the most productive, successful and enjoyable organisations to work for are the ones that champion collaboration, innovation and creativity. We want nothing more than for each individual to get inspired by what we do and generate ideas and more effective ways of working. We want each person to grow during their time with us and help move us closer to achieving our 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

## Who are we looking for?

We are a small team with a big remit, and we're looking for someone to co-ordinate the delivery of our ambitious marketing plans. With previous experience in marketing within the voluntary or public sectors, or a membership organisation, you will be looking to take your next step in your marketing career.

This is a varied role which offers a solid foundation in integrated marketing and communications in an ambitious national charity. In order to thrive, you will need to be well organised, unflappable, creative, analytical, focused on results, demonstrate attention to details and be able to prioritise your work.

## Job purpose

As a key member of the Marketing and Communications team, part of the Policy and Engagement directorate, you will play an important role in raising the profile of Charity Finance Group and helping the three directorates deliver the organisational strategy, and in particular, growing our charity and corporate membership, improving the member value proposition and engagement and event bookings.

## Key Responsibilities

This job description outlines the key accountabilities of, and output required from the post holder. It is not a definitive list and the role will change and evolve over time with the new team.

### General

- Working with the Head of Marketing and Communications, implement effective marketing and communications plans that support and deliver CFG's strategic priorities.
- Ensure that effective communication channels within the organisation are built and maintained.
- Promote the CFG brand and help build and safeguard its reputation externally, and promote the value of consistent, accurate and engaging communications internally.

### Marketing planning

- Working with the Marketing and Communications team, helping to deliver marketing plans and campaigns.
- Deliver planned marketing activities, liaising with external suppliers, partner organisations, CFG charity and corporate members, CFG's special interest groups, event speakers, other infrastructure charities.
- Develop marketing 'index' to evaluate all CFG's campaigns and activities.
- Contribute to the development of an on-going programme of market research to inform marketing planning.
- Evaluate all digital and offline marketing campaigns and produce regular reports to inform planning and provide insight to P&E and other directorates.

### Publications and marketing collateral

- Working with our design agency, develop briefs and manage the production of online and offline marketing collateral to promote membership, events and training.
- Co-ordinate the distribution of marketing materials at all CFG events and third party events, to promote CFG membership and events to delegates.
- Be responsible for the development, production and distribution of CFG merchandise, and ensure stock levels are maintained.
- Co-ordinate all CFG's direct mail marketing, working with suppliers to make sure that fulfilment is on time, in budget and of high quality.
- Maintain the Finance Focus forward planner and directory of published articles.

### Copywriting and editorial

- Write, edit and proofread marketing material for use across different online and offline channels, including newsletter to members and CFG subscribers
- Commission articles and blog posts and solicit case studies and testimonials to support CFG's content marketing strategy

- Edit Finance Focus, CFG’s monthly magazine for members on alternate months, and contribute to its on-going development

### Website and digital communications

- Manage the production and distribution of scheduled email bulletins, working with the Digital Marketing Co-ordinator to produce weekly jobs bulletins, monthly Finance Focus emails and fortnightly CPD emails to members.
- Support the Marketing and Communications Manager in developing digital assets: image library, digital banners and any other visual assets such as info graphics.
- Commission and co-ordinate photography and filming of CFG’s flagship events where required.
- Co-ordinate the management of data between our CRM and email platform, and prepare and update mailing lists for targeted marketing activity.

### Press and PR

- Develop systems for monitoring and recording press coverage on charity finance issues and CFG, and sharing a weekly with co-workers.
- Support the Policy & Engagement team with the writing and distribution of press releases and reports, and communicate with the sector press when required.
- Maintain and develop the organisation’s database.

### Additional responsibilities

- Attend internal and external events and meetings as a representative of CFG
- Be familiar with data protection issues relating to online and offline communication and keep up to date with guidance and best practice.
- Be a brand guardian - ensure that CFG’s verbal and visual identities are consistently applied in all external communications across the organisation.
- Ensure that member experience, quality assurance, professionalism, CFG’s reputation and value for money are at the heart of everything that the team does.

### Relationships

- Part of CFG’s Policy and Engagement Directorate
- Reports to Head of Marketing and Communications
- Works with Marketing Coordinator and Digital Marketing Co-ordinator
- Works with suppliers, agencies and volunteers when needed

### Person Specification

	<b>Essential</b>	<b>Desirable</b>
Qualifications	Good standard of education with English and Maths GCSE or equivalent	Degree level or equivalent, working towards a CIM qualification
Experience	Experience of working in a marketing role	Experience of working with

	Experience of working with data and a CRM system	corporate sponsors and partners  Experience in working in a CMS and managing data in a CRM
Skills/ Abilities	Ability to manage a heavy and diverse workload and meet deadlines Attention to detail and a focus on quality control Ability to communicate effectively with a wide range people and work collaboratively across a small team Creative thinking and problem solving Copywriting skills	A good eye for design Proof-reading skills
Knowledge/ Understanding	Understanding of the principles of marketing and communications	An understanding of the voluntary sector and its operating and regulatory environment
Disposition	A team player, sociable, collaborative, approachable and hardworking Ability to self-organise and use initiative Shows dedication to the task in hand and a focus on results Motivated and keen to develop and learn	
Other	Willing to work outside core hours occasionally and travel to conferences	

### How to Apply

Please download the job description application form and email your CV and completed application form to: [vacancies@cfg.org.uk](mailto:vacancies@cfg.org.uk)

Deadline for applications: We will be reviewing candidates as and when we receive CVs and applications and will appoint as soon as we meet the right person. Therefore, to avoid disappointment please apply early. This position is available immediately.

For information on the data we process during recruitment, please see our GDPR compliant Privacy Notice on our website.