



Candidate Briefing Document  
Partnerships 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 Partnerships Officer to support the integral relationships with our corporate members. 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.

# Partnerships Officer Job Description

**Reports to:** Director of Business Development & Events

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**Salary:** £26,780

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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. 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

## Are you who we are looking for?

We are looking for someone that has excellent interpersonal skills and is extremely well organised to manage a high workload as well as having strong business acumen and negotiating skills. We are looking for a customer focussed professional with an ability to manage relationships and deliver results.

## **The essentials – You will:**

- Be a natural relationship builder with strong communication skills;
- Be innovative, ambitious, questioning and solutions focussed;
- Feel comfortable meeting with senior finance professionals;
- Be a team player and working well within the directorate and wider team;
- Be open, approachable and a firm believer in continuous development.

## **Demonstrate CFG values by;**

- Maintain exceptional professional standards with internal and external colleagues.
- 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.

## **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.

### **Account Management:**

- Organise and play an active role in regular meetings with partners, liaising with colleagues to collate relevant updates, providing accurate minutes; and following up over details and deadlines of benefit delivery.
- Day to day tasks will include co-ordinating communications, promoting exhibition space and advertising opportunities, Work to ensure maximum income from each subscriber.
- Collate all relevant information in a timely manner for reporting to sponsors, exhibitors, hosts and speakers following each project.
- Coordinate thank you letters for hosts, speakers and chairs to maintain strong relationships with corporate and charity contacts.

### **Securing support:**

- Manage the sale of CFG exhibition, sponsorship packages, advertising, Annual Fundraising Dinner and other projects to the corporate sector and other partners.
- Identify opportunities to secure gifts in kind and volunteers including venue hosts, speakers, and writers/contributors.
- Ensure opportunities are effectively communicated working with Marketing team.

- Provide regular reports and share updates on sponsorship approaches with Director of BD & E.

### **Innovation and New Business:**

- Regularly researching business opportunities in line with strategic goals.
- Work with the marketing team to produce attractive and effective publicity materials in line with CFG brand and house style.
- Identify and research prospects making informed, well-targeted cold calls and written approaches and participate in face to face presentations where appropriate.
- Build strong relationships with prospective sponsors and agencies. Ensure on-going cultivation as appropriate via invitations, email and on-going liaison.
- Ensure professional and consistent follow-up with all prospects.
- Provide regular reports and share updates on approaches made.

### **General:**

- Assist with and attend CFG events taking advantage of networking opportunities.\
- Manage regular communications programme to subscribers including e-newsletter and develop targeted communications to non-subscribers.
- Research potential partners and the marketing to provide insight in to opportunities.
- Prepare project schedules, prospect lists and reports as needed. Keep abreast of sponsorship trends and news. Suggest ways for partners to exploit CFG activities and encourage leveraging programmes and award applications to secure renewals.

### **Additional responsibilities:**

- 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.
- Other such duties as shall reasonably be required as part of a collaborative staff team.
- Maintain exceptional professional standards with internal and external colleagues.
- Represent CFG values at all times

## Person Specification

	<b>Essential</b>	<b>Desirable</b>
Qualifications	Good standard of education with English and Maths GCSE or equivalent	Degree level or equivalent
Experience	Experience of sales or account management ideally from within the not for profit or corporate sectors (and preferably both) Experience of negotiating/commercial acumen Experience of using a database	
Skills/ Abilities	Ability to effectively present, negotiate and build relationships Exceptional attention to detail Articulate, with excellent written and verbal skills and diplomacy Calm and confident with an ability to negotiate benefits and resolve issues Proactive with excellent planning and organisational skills; good at prioritising, managing reactive work, balancing multiple requirements and adapting to unexpected situations Ability to work collaboratively across a small staff team Creative thinking Ability to work on own initiative Well-developed IT skills Good administration skills	
Knowledge/ Understanding	Knowledge of best practice in prospect research, cultivation, solicitation and stewardship	Understanding of marketing and PR
Disposition	Approachable, loyal and hardworking Excellent interpersonal skills – sociable and confident Ability to communicate at all levels	
Other	Ability to undertake travel within the UK Willing to work outside core hours on an occasional basis	Ability to undertake occasional overnight stays with the UK

## 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.