

# JOB DESCRIPTION

## SECTION 1

### BASIC DATA

<b>Job Holder's Name:</b>		<b>Job Title:</b>	Director of Financial Capability
<b>Reports to:</b>	Chief Executive Officer	<b>Location:</b>	Hybrid
<b>Department:</b>	Financial Capability	<b>Job Family:</b>	Director

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## SECTION 2

### ORGANISATIONAL STRUCTURE

This role reports to the CEO.

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## SECTION 3

### JOB PURPOSE

(What is the purpose of the job?)

This role will be responsible for developing and implementing strategies to broaden the use of financial capability educational content. The development of the financial capability proposition will be to support our charitable objectives as well as generate income to fund our charitable activities. They will build strong relationships with appropriate stakeholders and contribute to enhancing our brand identity.

This role will also oversee day-to-day operations across the following services e.g. IT, facilities management, project management and HR).

### SIZE/DIMENSIONS

(In what context does this role operate in terms of area of impact, financial budgets and supervision and or management of staff.)

This is a senior role within LFBF with responsibility across a wide range of areas with the main focus being on financial capability.

## SECTION 4

### PRINCIPAL ACTIVITIES/OUTPUT OF JOB

(This area outlines in more detail the duties of the post holder).

1. Develop and implement strategies to promote and broaden the use of the content from existing financial capability educational material to build income streams.
2. Develop a business model for the financial capability content which balances the achievement of our charitable object with income streams.

3. Develop a suite of metrics by which to measure success, to include both social and commercial impact
4. Raise awareness of the London Foundation of Banking & Finance's (LFBF) charitable objective for the advancement of knowledge and education in the financial services sector.
5. Build relationships with relevant organisations and stakeholders to improve Financial Education knowledge in line with our charitable remit.
6. Through interaction with stakeholders contribute to the development of a strong brand identity for the London Foundation of Banking & Finance programmes, reflecting The London Foundation of Banking & Finance values and strengths.
7. Lead and support presentations to win commercial commitment from organisations and stakeholders.
8. Maintain accurate and complete business development records and adhere to all requirements of GDPR.
9. Identify and develop partnerships for the commercial promotion of The London Foundation of Banking & Finance financial capability proposition, events content and charitable objectives.
10. Play a key role in supporting UK policy development and implementation with regard to financial inclusion and capability - acting upon and responding to initiatives proposed by UK and international policy makers, legislative bodies, and regulatory authorities.
11. Support the development of our communications strategy in relation to financial capability, including media and campaigns work; thought leadership; member briefings and correspondence.
12. Leverage strong project management skills to drive and sustain financial capability projects.
13. Ensure processes and procedures are efficient, scalable, and aligned with charity objects.
14. Manage operational risks and ensure compliance with regulatory requirements.
15. Collaborate with the CEO and executive team to define long-term strategies and translate them into operational plans.
16. Implement initiatives that drive business growth, productivity, and operational efficiency.
17. Monitor the execution of strategic plans to ensure alignment with business objectives.
18. Lead initiatives to improve processes, reduce costs, and enhance customer satisfaction.
19. Promote a culture of innovation and continuous improvement across the charity.
20. Stay updated on industry trends and technological advancements to maintain the company's competitive edge.
21. Oversee day-to-day operations across the following services (e.g., IT, Facilities management, Project management and HR).

### **CONTACTS AND INFLUENCE EXERCISED**

(Type, number and seniority of contacts, impact of influence)

This role interacts with the CEO, other senior colleagues in LFBF, the Board of Governors and external stakeholders and service providers.

### **DECISIONS**

(How much freedom is there to provide solutions, and make decisions regarding the resolution of problems within the constraints of established guidelines or procedures, and supervision?)

Indicate the level which best describes the job holder's involvement in the decision-making process:

Follows written and verbal instructions and established guidelines	
Interprets policies & procedures	
Participates in the establishment of guidelines & procedures	
Acts as final authority to implement policy, guidelines and procedures that affect strategic goals	X

Indicate the statement which best describes the impact of the job holder's decisions:

Restricted to employee's own work	
Has impact on department/directorate* objectives	
Has impact on The London Foundation of Banking & Finance objectives	X

**DEFINITION /CLARITY**

(The extent to which to job is defined; the clarity of the job's boundaries, levels of uncertainty)

This is a new role and is therefore subject to amendment.

**ANY ADDITIONAL FEATURES OF NOTE**

This is a part time (0.6FTE) hybrid role with the expectation of being in the London office at least one day every other week (Wednesday).

Job holder signature

Date:

Line Manager signature:

Date:

## PERSON SPECIFICATION

<b>Qualifications, knowledge and professional memberships</b>	<b>Essential / desirable?</b>
First degree in a relevant subject such as Marketing, Business or Management	E
Relevant qualification in educational pedagogy or development of learning materials /technology	E
Knowledge of GDPR and data protection requirements, with the ability to maintain accurate and compliant records	E
<b>Technical Skills, Knowledge and Experience</b>	<b>Essential / desirable?</b>
Experienced in overseeing the development of learning materials	E
Proficient in overseeing the development of new qualifications	D
Established track record in setting up and operating a Learning Management System (preference would be Brightspace)	E (D)
Experienced in setting up a CRM system (preference would be Salesforce)	E (D)
Evidence of developing and managing a volunteer network to provide in person financial education and / or financial education training	D
Demonstrated ability to develop plans for promoting the awareness and use of educational materials	E
Experienced in developing and managing partnerships with stakeholders	E
Experienced in overseeing day to day operations (including managing relationships with third party providers such as HR and IT consulting firms)	E
Ability to identify commercial opportunities and work collaboratively to realise them	E
Confident as the subject matter expert and credibly presenting to Boards or high-level committees	D
<b>Core competencies</b>	<b>Essential / desirable?</b>
Excellent Organisational and project management skills with the ability to manage multiple priorities and meet deadlines	E
Influencing and negotiating skills	E
Collaborative and team-oriented, with the ability to work effectively with colleagues, partners, and stakeholders	E

Excellent communication and presentation skills, with the ability to engage and persuade stakeholders at all levels	E
Strong strategic thinking and planning skills, with the ability to develop and implement effective strategies for growth and revenue generation	E
Creativity, problem solving and decision-making skills	E
Strong relationship management skills, with a proven track record of building and maintaining partnerships	E
Microsoft Office including advanced Excel skills	E
Commitment to Continuous Professional Development	E
Strong ethical standards and integrity	E