



Job Title - Financial Wellbeing Training Consultant

Contract - Freelance (12-month minimum commitment)

Hours - Flexible (50-150 hours per year, depending on personal preference, demand and available funding)

Based - North-West England (able to deliver Workshops in Manchester, Liverpool and surrounding areas).

Rate - £55-£130 per hour, depending on session length and delivery arrangements

Expenses - Out-of-pocket expenses will be reimbursed when incurred, in accordance with our expenses policy.

About Us

For 30 years, The Money Charity (TMC) has been the UK's Financial Capability charity. We proactively provide education, information, advice and guidance to people of all ages, helping them to manage their money well and increase their Financial Wellbeing. We believe that being on top of your money as a part of everyday life reduces stress and hardship, helps you achieve your goals and live a happier life as a result, so we empower people across the UK to build the skills, knowledge, attitudes and behaviours to make the most of their money throughout their lives.

We are a small, passionate team with a big reach and an open mind, committed to quality, accessibility and inclusiveness. We offer a flexible work environment that values creativity, personal growth and collaboration.

For more information about us, please visit our website: <https://themoneycharity.org.uk/>

About The Role

A core strand of The Money Charity's offering is helping adults in their place of work or in their local community to build the skills, knowledge, attitudes and behaviours to manage their money well. Our work has never been more needed with the pressures of the cost of living crisis, which whilst having a material impact on many people's Financial Resilience, has opened up opportunities to talk to people about money and help them engage with their finances at this challenging time.

We do this by partnering with employers and community organisations to deliver a range of interactive Financial Wellbeing Workshops and Webinars to employees, volunteers and service users. The sessions are engaging, interactive and bring the topic of money management to life. Details of the sessions we currently offer, including the formats, can be found in our [Workplace](#) and [Community](#) Guides, published on our website.

We are looking for a new Freelance Consultant to add to our network of Financial Wellbeing specialists who deliver our sessions both in their region and virtually. The successful candidate will deliver Workshops both virtually (primarily via Zoom or Microsoft Teams) and face-to-face. **This role will therefore involve a reasonable amount of travel within your region and occasionally more widely across the UK.**

This Consultant will deliver both funded (free-of-charge) in Community settings and commercial (paid-for) Workshops in the Workplace. From time to time Consultants may also be used to support the delivery of a range of Financial Wellbeing Consultancy projects which can include, but is not limited to, the development and/or delivery of bespoke Workshops and Webinars.

Key Responsibilities

Programme Delivery & Development

- Deliver The Money Charity's Financial Wellbeing sessions in Workplaces and/or adult Community settings in your region and virtually, in accordance with the process and quality standards set out by the charity
- Establish and maintain positive relationships with clients and host organisations
- Effectively engaging participants by presenting sessions in a clear, concise, creative and engaging manner, ensuring delivery is appropriate to the audience of each setting as far as possible and that learning objectives are met
- Work collaboratively with charity staff to support programme delivery, including administrative and logistical support
- Support the continuous development and innovation of sessions and other programme content by providing feedback to programme teams in an honest and timely manner
- Stay up-to-date with financial products, current events, news and issues and relevant Financial Capability sector developments to ensure knowledge base for delivering high-quality sessions is sustained
- Delivery of Consultancy projects, allocated based on client needs and Consultant capabilities, working with other Consultants and staff of TMC to complete projects as required
- Contribute to the evaluation of Financial Wellbeing sessions and programme activities in collaboration with relevant charity staff and external partners
- Maintain accurate, up-to-date and GDPR compliant data, electronic and paper records for monitoring programme activities as required

General

- Support activities that contribute to the growth and sustainability of the charity as directed
- Be proactive in reviewing and evaluating own performance, identifying and acting upon areas for improvement
- Provide feedback to the charity on session delivery, content and the wider process in an honest and timely manner
- Attend and participate in training, events, Consultant network and other meetings as required relevant to the delivery of Financial Wellbeing sessions and/or other programme activities
- Representing TMC, upholding the charity's mission, vision and reputation
- Undertake other duties compatible with the level and nature of the role and/or reasonably required

Person Specification

Experience & Qualifications

- Experience delivering training to groups of young people and/or adults in a professional or voluntary capacity
- A minimum of A-C GCSE Maths and English or equivalent
- Experience of working with adults in more vulnerable circumstances (desirable); and/or
- Experience working in the financial services sector (desirable)
- Experience of partnering with community and corporate organisations (desirable)
- A degree qualification (desirable)

Knowledge, Skills & Abilities

- A good understanding of the money management and personal finance issues facing UK adults in the Community and Workplace
- An understanding of the Financial Wellbeing sector (desirable)
- A fluent command of English and have the right to live and work in the UK
- Willingness to travel within the UK
- A valid UK driving licence and the use of a car (desirable)
- Excellent presentational skills with ability to present in a confident and creative manner
- Ability to deliver training to diverse audiences and/or on sensitive topics, adapting delivery style as appropriate
- Ability to think on your feet, be flexible and respond well under pressure
- Ability to explain financial issues in a clear, engaging, positive and non-judgemental way
- Ability to work as part of a team
- Excellent interpersonal and relationship management skills
- Excellent organisation and diary management skills with ability to self-motivate
- Good level of competence in use of IT, including hardware for presentations, G Suite packages, Zoom and Microsoft 365 packages (including Microsoft Teams)

Personal Qualities

- Keen to work with adults to empower them to be financially capable
- Demonstrable passion for The Money Charity's vision, mission and values
- Positive, credible attitude to own Financial Capability and Financial Wellbeing
- Willingness to develop personal competencies as appropriate to support objectives

The Money Charity is committed to safeguarding and promoting the welfare of young people and vulnerable adults and expects all staff, contractors and volunteers to share this commitment. For any Consultants delivering to beneficiaries or service users in the community, a satisfactory Enhanced Disclosure and Barring Service Check is required.

Closing date: 11:59pm, Sunday 21 April 2024.

Interview: Week commencing 29 April 2024 and 6 May 2024. This will be virtual and exact dates and times are to be arranged.

Training: The successful candidate will need to attend an induction training day (paid) in May 2024 before commencing the role. Exact format, date and time to be confirmed.

Application Details

To apply for the role, please submit a CV and covering letter of no more than one side of A4 to jobs@themoneycharity.org.uk using "Financial Wellbeing Consultant" in the subject line.

When writing your covering letter, you should focus on providing evidence and specific examples that demonstrate how you meet the person specification and your suitability for the role. We value transferable skills and encourage applicants who do not have direct experience to provide examples from other areas that meet the requirements.

Please note we will not proceed with any applications which do not include an appropriately detailed covering letter.

Please ensure that you provide a phone number and email address so that we can contact you easily and in confidence.

Unfortunately, we are unable to respond individually to all applications so if you have not heard from us by the advertised shortlisting and/or interview date(s), this means your application has not been shortlisted on this occasion. Feedback will be given upon request to candidates who attend interview.

For further information, or if you have any questions about the role or our recruitment process, please email jobs@themoneycharity.org.uk

Please note, we request NO contact from recruitment agencies or sales.