



Candidate Pack



Finance and Operations Director

Location: Remote (Regional hubs based in Birmingham, Southampton, Cardiff, Belfast, Glasgow, Manchester and London) and some travel is expected

Duration: Permanent, part time (4 days minimum) or full time

Reports to: CEO

Direct Reports: 2 (wider team of 4)

Salary: £65 - 75k FTE dependent on skills and experience

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A personal message from our Chief Executive Officer.
- 2. Who are MyBnk?**
An introduction to our organisation, its mission, and values.
- 3. Our Programme**
A quick guide of our suite of programmes.
- 4. Impact and Delivery**
A overview of our impact during 2022/23.
- 5. Equality, Diversity & Inclusion**
Our commitment to fostering and inclusive workplace.
- 6. Overall Purpose of the Role**
Understand the broader objectives and significance of your position.
- 7. Key Responsibilities**
The main duties and expectations associated with your role.
- 8. Person Specification**
The skills, qualities, experience and attributes expected for the role.
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An overview of our benefits package.
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Step by step guide on the application process and what to expect.

Letter from our CEO



Dear Candidate,

Thank you so much for your interest in MyBnk.

MyBnk is a financial education charity dedicated to creating a financially fluent population. We believe that financial literacy should be considered a right for all because the language of money is the language of life.

Everyone needs to be able to manage their money. Yet almost two-thirds of young adults do not recall receiving an financial education at all, and 53 per cent are worried that they will never be financially secure. Poor financial literacy is central to many problems people face today, including rising mental health issues, homelessness and unemployment.

MyBnk aims to bridge this gap, working with over 50,000 young people and adults across the UK every year, delivering expert-led, high-impact financial education programmes on topics such as saving, debt and student finance. We want to bring the language of finance to life so that everyone can navigate their money with confidence, no matter where they started.

We have four Directorates that support the organisation:

- Programme and Delivery Directorate
- Fundraising and Communications Directorate
- Finance and Operations Directorate
- People and Culture Directorate

In 2024, we launched our new strategy 'Money: A Language for Life', which will guide us through to 2027 as we continue expanding our reach and impact.

You will be joining a great team of people who are motivated to help level the playing field for young people and adults.

We encourage people of all backgrounds to apply for roles at MyBnk. If there are any reasonable adjustments that need to be made to ensure the interview process is accessible for you, then please let us know.

Good luck with your application and I look forward to meeting you!

Leon Ward

A handwritten signature in black ink, appearing to read 'Leon Ward'.



Who are MyBnk?

We are a dynamic team dedicated to empowering people with the skills, knowledge, and confidence to take control of their financial futures and thrive. Through engaging and impactful financial education programmes, we equip individuals with essential money management skills - from budgeting and saving to investing.

At MyBnk, our strength lies in our people. Across the UK, from all four nations, our team is united by a shared passion for financial inclusion. Whether you're based in England, Scotland, Wales, or Northern Ireland, you'll be part of a creative, forward-thinking group that values innovation, inclusivity, and collaboration.

If you want to join a team where you can make a meaningful difference, while growing personally and professionally, MyBnk could be the perfect place for you.

Our Vision:

A financially fluent population.

Our Mission:

We bring the language of finance to life so that everyone can navigate their money with confidence, no matter where they start.

Our Programmes

School aged children and young people

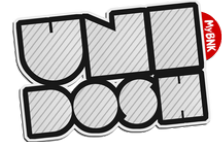
Primary



Secondary



16- 18 year olds



Our expert-led school age programmes aim to build financial capability at key transitional moments, addressing mindsets, attitudes and behaviours to help young people form an understanding of the wider world of money.

Young adults



Our expert-led programmes aim to give adults in vulnerable circumstances 'survival' money skills and knowledge that they can implement immediately in their transition into independent living

Impact & Delivery

52,960

young people supported through our financial education programmes in 2023/24 (43% increase from 2022/23).



12,295
delivery hours



519
organisations
partnered with



2,512
money management
accreditations

Our work across the UK

MyBnk continues to expand nationally, reaching people in all four UK nations.

Learn more about our work and our impact in our 2023-24 Impact Report:



Equality, Diversity & Inclusion

MyBnk is committed to equality, effective diversity management, and fostering an inclusive workplace culture.

Supported by leadership from our senior leadership team (SLT), all of whom have received inclusive leadership training, we are on a journey to realise our commitment through the development of a comprehensive EDI Strategy and Plan in 2025. This will include an organisation-wide EDI survey, EDI and unconscious bias awareness training, a staff voice forum, and continued Board-level engagement.

We have begun integrating EDI principles into our people practices, initially focusing on recruitment, selection, and other key areas, while using insights from staff surveys to inform our ongoing efforts. MyBnk is committed to embedding fairness and inclusivity throughout all aspects of our work and we are taking an evidence-based approach to our EDI strategy, with the aim of improving and evolving our practices.

Our Values:

- 1. Young at heart, serious in intent.**
- 2. Stories are the best means of education.**
- 3. We live in the real world.**



Overall purpose of the role:

This role will take overall strategic responsibility for the financial and operational management of MyBnk.

They will manage the internal and external financial processing and reporting, ensuring statutory and donor compliance, and foster a business partnering approach between the Finance team and the wider organisation.

Our Finance and Operations Director will offer strategic insight into planning, forecasting, financial modelling and budgeting. The role will be a member of the Senior Leadership Team, and be a trusted expert advising the Board of Trustees. They will be a key driver of operational efficiency and improvement.



Key responsibilities:

Strategic Financial Management

- Lead budgeting and management accounting processes, ensuring that senior management and trustees have a strong understanding of the financial implications of their plans and decisions, including forward financial modelling and forecasts, variance analyses, cashflow forecasts and reserves targets.
- Ensure business partnering is in place that allows senior management and trustees are able to obtain answers to financial queries, relevant analyses, and updated information when necessary.
- Leadership on all aspects of statutory annual reporting and audits, working with the external auditors, including the implementation of findings and improvement areas.
- Working with senior management team to ensure donor-related processes are compliant, efficient, and provide the best results for the charity.
- Ensure that all finance systems, policies and controls are fit for purpose and well understood across the charity.
- Line-manage the finance team.

Operational Financial Management

- Oversee transactional processing, to ensure these are efficient and accurate, and accounting transactions are compliant with relevant accounting standards.
- Oversee payroll, ensuring this is managed efficiently, accurately, and is compliant with HMRC and pensions regulations
- Oversee internal management accounting and donor reporting and contract management
- Oversee the financial aspects of donor acquisition
- Ensure VAT reporting and other tax filings are completed on time and accurately
- Manage the organisation's cashflow and reserves levels, and maximise any potential investment returns



Operational Delivery

- Supported by the Systems Transformation and Database team, you will systematically enhance, streamline and optimise operational processes and systems to enhance the working practices of the organisation.
- You will lead on efficiency, quality, and scalability while driving technological advancement. This includes systems, IT, CRM, facilities and vendor management. You will be supported by a Senior Systems and Transformation Manager and a Database Manager and our outsourced IT provider.
- Enhancing adherence to organisational systems, e.g. Office 365, Sharepoint, Salesforce, ensuring the organisation becomes more efficient and effective in how it works.
- Maintain MyBnk's risk register and ensure its regular review throughout the organisation.

Governance

- Operate in the capacity of Company Secretary and ensure compliance with Companies House and the Charity Commission.
- Support the strategic development of the organisation to ensure it has appropriate management and governance in place as we continue to grow.
- Ensuring compliance with charity and company law including UK GDPR and producing timely updating of accurate company records
- With the CEO, ensure the appropriate scheduling and recording of the work of our Board of Trustee and sub committees ensuring papers are produced and that business flows effectively between the SLT and the board.

Whilst much of this role is naturally about the internal mechanisms, all MyBnk Directors are proactively exploring and securing strategic partnerships that benefit the organisation. You will be a leader in your field and MyBnk will support you in shouting about the great work you will be doing here.

Working across MyBnk

- Work with colleagues across the country as we continue to develop and grow the organisation.
- Contribute to areas of the organisation that are 'outside' your immediate focus acting as trusted counsel to those in roles or teams that are different to yours.
- Embed yourself into the organisation – recognising that our strategy and business plan are yours to deliver and that our culture is shaped with you and by you.
- Comply with all MyBnk management processes – helping us to help you do the best job you can.
- Support the work surrounding our Board of Trustees.
- Build highly productive relationships with influential people, both internal and external, and negotiate effectively to achieve positive outcomes that support fundraising activities.

As with all roles at MyBnk this job description outlines the key responsibilities, requirements, and attitudes of the role. It is not an exhaustive list of tasks that need to be completed and MyBnk reserves the right to amend the job description as both the role and the organisation evolve.

Naturally, the nature of our work means there will occasionally be a need to work outside of our core hours for which TOIL will be provided.



Person specification

Knowledge, skills and experience

- Qualified accountant with significant experience in a senior finance role in a UK-based charity setting.
- Track record of operating at a senior level to provide strategic financial, risk and business services advice ideally with exposure to a Board or, at minimum, individual Trustees
- Highly developed analytical skills, with the ability to handle projects and problems of increasing complexity and make good quality judgements and decisions on the basis of analysis.
- Demonstrable experience of managing a finance and operations team and of working with a variety of finance software packages
- Relevant experience, underpinned by deep professional knowledge of developing an organisations approach to IT, AI, systems, and processes.
- Demonstrable experience in fostering innovation and implementing forward-thinking strategies and approaches in finance and operations.
- Strong experience of leading or being heavily involved in the planning and implementation of change strategies.
- Highly skilled at leading cultural change and embedding practices that drive a progressive and dynamic finance and operations functions.
- Outstanding diplomatic, influencing and negotiating skills to secure trust and confidence.
- Ability to present finances and operational data in a way that is accessible, insightful and empowers Managers.
- Confidence and ability to constructively challenge across the organisation and within the senior leadership team.
- Entrepreneurial and commercial acumen; using data and insight to support our plans.
- Emotionally intelligent leadership style; open to feedback and learning
- An unwavering commitment to equality and diversity weaved into all your work.

This job description is subject to regular review and may evolve to meet the needs of MyBnk, ensuring ongoing alignment with the organisation's objectives and compliance with relevant legislation. Please also note this post is subject to satisfactory references, one of which must be from your current or most recent employer, and DBS/equivalent checks.



Benefits



25 days per year annual leave, pro rata full time equivalent (plus bank holidays and Christmas break closure).



Pension scheme (4% from you, 4% from us. If you put in 6% we put in 5%)



Income protection insurance.



Death in service insurance.



Cycle to work scheme.



Annual training allowance.



Enhanced maternity, paternity and adoption leave and pay.



Flexible working policy.



Season ticket loans.



Cash Health plan.



Employee Assistance Programme.



How to apply

Information Session

There will be an online information session with MyBnk CEO, Leon Ward, and Interim Finance and Operations Director, Stuart Davis, on **31st January 2025 at 12noon.**

[Click here to sign up.](#)

You are welcome to join the call anonymously, please just check your settings beforehand. If you cannot make the live webinar, please still register as the recording will be sent to you.

Important dates:

- The deadline for applications is **Sunday 9th February at 11:59pm.**
- First round interviews will be held online on **17th February.**
- As part of the selection process, we will be asking final stage candidates to complete an online emotional intelligence assessment instrument, the Emotional Quotient Inventory (EQ-i) over the weekend **21st-23rd February.**
- Final round interviews will be held on **27th February** and will be in person in London.

To apply for this role please:

1. **Click here** to access our vacancies site;
2. Enter your details and submit a **CV** and **supporting statement of no more than 2 pages** outlining how you meet the criteria for the role and your interest in MyBnk.

If you have any questions or require any adjustments during the recruitment process, please email: **jobs@mybnk.org**



