



Senior Fundraising Officer application pack



About Money and Mental Health

In 2016 Martin Lewis CBE set up the charity to create a world in which the vicious cycle of money and mental health problems is broken.

Money and Mental Health want everyone to have an equal chance of financial security, regardless of our mental health; and a world in which everyone's mental health can flourish, regardless of their financial circumstances.





Money and Mental Health Policy Institute

Money and Mental Health has a trusted reputation and a strong track record of impact. We're ready to take our fundraising to the next level, and we're looking for an ambitious and talented fundraiser to help us grow our income, develop our fundraising culture and strengthen our relationships with funders.

The toxic relationship between money and mental health problems is undeniable. The evidence is now crystal clear, the case is made, and action to tackle it is starting to snowball. And yet the catastrophic harm that it causes is still destroying lives every single day:

- People with mental health problems are three and a half times as likely to be in problem debt. Average incomes are lower, costs are higher, and it's harder to control spending, manage money and ask for help when you're struggling.
- Problem debt causes mental health problems, and makes recovery from them much harder. Half of people in problem debt now have a mental health problem.
- And people in problem debt are three times as likely to have thought about suicide in the last year. 100,000 people in problem debt attempt to take their own lives every year.

The Money and Mental Health Policy Institute is here to change this, and we're making progress. Founded by Martin Lewis CBE, we aim to be a world-class centre of expertise, but we don't produce research to just sit on shelves. We develop practical policy and solutions, building strategic partnerships with those providing services, those who shape them, and those using them, to find out what really works. We campaign, build, test and innovate until our research leads to real change. Some of our key achievements in recent years include:

- Successfully campaigning to secure the new mental health crisis debt respite scheme, so everyone using mental health crisis services can now recover free from interest, fees, charges or collections activity
- Securing a government commitment to change long-standing rules which required lenders to send distressing enforcement letters to people in problem debt
- Our impactful Mental Health Accessible programme working with 14 financial services and utility providers, all of which have made significant changes to products and services to improve outcomes for their customers with mental health problems.
- Our innovative Gambling Harms Action Lab bringing together a cohort of seven banks to secure industry-wide change tackling gambling harms, and trialing an impactful new delivery model that is ready to scale.

All of this is underpinned by the UK's largest mental health lived experience panel, 5,000 people who feed into everything we do. And this expertise has been recognised as the charity was this year awarded Super-complainant status by the Government, a formal power only given to a handful of organisations giving us the ability to make formal representations to regulators on behalf of consumers.

But despite the change that has happened, there is so much more to do. The cost of living crisis left a deep financial scar in the lives of millions who were already struggling, and exposed many people who had never faced money and mental health problems to their destructive effects.

That's where you come in. This is an exciting opportunity to play a central role in building our income and enabling us to have more impact where it is desperately needed.



A message from our Chief Executive

We're delighted to be recruiting a **Senior Fundraising Officer** - an integral role in our new Fundraising team.

This is an exciting moment for the Money and Mental Health Policy Institute. Over the last nine years we've built a reputation as the UK's leading authority on money and mental health, delivering research and policy change that has improved the lives of millions of people. With Martin Lewis as our founder, we have both visibility and trust that few small charities can match.



We know there is enormous potential to grow our income and expand our impact. Until now, fundraising has only been a very small part of what we do, but our credibility, networks and track record mean we have a strong case for support and a wealth of untapped opportunities. We recently recruited our first Head of Fundraising to drive this work forward in the coming years, and we've created the Senior Fundraising Officer role to help grow our income and support the organisation to realise its full potential.

For this role, we're particularly keen to hear from people with experience of writing and managing successful applications for funding from Trusts and Foundations. We're also looking for someone who with the initiative and relationship-building skills to help us identify and engage with new fundraising opportunities, from grant income to corporate partnerships. Above all, we want someone who shares our passion for tackling the toxic link between money and mental health problems.

You'll be joining a small, passionate team with a supportive and flexible working culture. We place huge trust in each other, we work collaboratively, and we are proud of the environment we've created together. From our new East London office to our commitment to flexibility and work-life balance, this is a place where you can thrive while making a real difference.

If you're an ambitious fundraiser with the drive to help us build our income and develop our fundraising culture, we would love to hear from you.

Best wishes,

Helen Undy OBE
Chief Executive



What it's like to work here

Our head office is based in London, and we operate a hybrid work model, with the majority of our team working in the office two days a week. We also have a number of non-London based staff - from as far as the Isle of Wight - who primarily work from home, but who come to the office twice monthly.

The wellbeing of our staff is the most important thing to us, and we have a **flexible work culture**, allowing employees to be flexible with their hours and location.

In our 2024 staff survey, 100% of staff said that Money and Mental Health is committed to doing quality work, has a supportive team culture and that they have a good working relationship with their colleagues.

We are still relatively small with a team of just 23 but as an organisation we punch above our weight and **have a significant impact**.

We have staff working across four main functions: Research and Policy, External Affairs and Income, the Gambling Harms Action Lab, and Strategic Partnerships, which includes our Mental Health Accessible programme.

Across those teams, we're all passionate about putting the voice of lived experience at the heart of everything we do. We welcome team and board members who have personal experience of mental health problems or financial difficulty.

We are committed to improving employment opportunities in the charity sector for people from underrepresented communities and are particularly keen to receive applications from people from minoritised ethnic groups. We're currently developing a new Equality, Diversity, Inclusion and Belonging Strategy and are working to become a more inclusive workplace.

We're proud of the environment we've already developed, with a high proportion of our team with personal experience of mental health problems. And we're committed to employees' professional growth and development.





Key details

- **Salary:** £43,752 (employees who are not London-based receive the same salary, including London weighting, but cover their own travel costs to the office, typically twice a month)
- **Location:** Either London-based, with two days per week in Money and Mental Health's East London office, or home-based with the ability to travel to London at least twice per month. The role will also require some travel for meetings.
- **Hours:** Both full-time and part-time applicants considered, at a minimum of four days per week. Job shares, consolidated hours and other flexible working arrangements will be considered. Please indicate your preferred working hours on application.
- **Contract type:** Permanent
- **Reporting to:** Head of Fundraising
- **Line management:** None
- **Holidays:** 28 days per year (including 3 days between Christmas and New Year when the office is closed), plus bank holidays
- **Pension:** Opportunity to be enrolled in the work pension scheme (subject to meeting standard auto-enrollment qualifying criteria). After auto-enrollment the charity will make a monthly contribution to the scheme equivalent to 5.5% of the monthly gross salary you receive, subject to you making a minimum contribution of 2.5% of the monthly gross salary you receive.
- **Other benefits include:**
 - Every team member has a personal training budget, with many internal training opportunities
 - Cycle to Work and season ticket loan schemes
 - Enhanced maternity/paternity/parental leave terms: employees eligible for statutory maternity/paternity/shared parental pay receive 90% of earnings for up to 12 weeks.
 - Rental deposit loan scheme
 - Benenden healthcare package
 - A flexible working culture: core working hours are 10am–3pm, with flexibility outside these times (agreed with management) for employees to distribute working hours across the week.



The role

The Senior Fundraising Officer's primary role is to help Money and Mental Health secure the income it needs to deliver its mission and further strengthen the charity's financial footing for the future. This is a crucial role in our new Fundraising team, and the successful candidate will work across all elements of our income generation activities - from grant-writing to donor stewardship and pipeline development.

The role will have a particular focus on securing funding from Trusts and Foundations, but there will also be ample opportunities to engage corporate partners and other prospective funders.

The successful candidates will have the chance to bring their ideas in terms of identifying new routes to funding for the organisation and shaping our income generation activities.

Key responsibilities

Funding bids and proposals

- Draft and develop effective and impactful fundraising bids and proposals to secure both grant income and corporate sponsorship.
- Project manage the process of developing funding proposals - including completing funding checklists, coordinating the team on relevant deadlines and booking in time for sign off from relevant colleagues.

Relationship management

- Play a key role in donor stewardship alongside Head of Fundraising and Senior Leadership Team (SLT), including grant makers, corporates and individual donors.
- Support SLT in identifying - and building relationships with - relevant individuals within prospective funder organisations - including coordinating meetings.
- Ensure we stay on top of our grant requirements, including drafting grant reports and coordinating other team members to fulfil those requirements.
- Work with External Affairs team to create excellent supporter journeys for online donors.



Key responsibilities (continued)

Pipeline development

- Work with Head of Fundraising to undertake research into new fundraising prospects and to develop a strong funder pipeline.
- Stay on top of new developments in the charity sector and wider funding landscape.
- Make recommendations to Head of Fundraising on new funders we should engage with or seek to build relationships with.
- Maintain accurate pipeline data and prospect records, ensuring regular updates.

Planning, strategy and vision

- Contribute to the delivery of our income generation strategy - including meeting relevant targets set out in the strategy.
- Support the team with advance planning on funding bids, project managing complex cross-team processes, matrix-managing small project teams and ensuring all key milestones are met.
- Proactively suggest ideas for ways of improving our processes and ways of working to better support our income generation targets or better deliver our work.

About you

We're seeking someone who is ambitious, driven and emotionally intelligent. We need a relationship-builder and a clear and concise communicator, ready to step into an exciting new role and help build a fundraising function which leaves a lasting legacy.

Essential qualities

- A proven track record of securing five-figure grants or income from trusts, foundations and/or corporate partners.
- A demonstrable track record of writing impactful and effective funding proposals, and leading the end-to-end process of applying for grants and reporting on those received.



Essential qualities (continued)

- Strong copywriting skills, and the ability to articulate the impact from donations.
- Excellent project management skills.
- Solid relationship management skills, with the ability to lead donor stewardship and develop excellent working relationships with key teams internally.
- A genuine commitment to the organisation's mission, as well as to the principles of equality, diversity and inclusion.
- Ability to work independently and as part of a team, managing a busy to-do list.
- Ability and desire to be hands-on and get stuck in.
- Excellent attention to detail, record-keeping and commitment to high standards.
- Basic understanding of fundraising regulations, including Fundraising Code of Practice, and how they apply to your work.
- Experience of working towards personal income targets and managing individual KPIs.

Desirable qualities

- Experience using relevant trusts and foundation and CRM databases.
- Experience of developing and managing a pipeline of funding opportunities, and advising colleagues on where to prioritise our resources.
- Experience of fundraising for a small charity, think tank or a research charity
- Experience of working with project budgets.



The application process

Closing date: 9.30am on Monday 2 March

Interviews: To take place during weeks commencing 7 or 16 March.

[Apply here.](#)

We are committed to reducing unconscious bias in our recruitment process. To help with that, we use a platform called Applied which allows us to review applications without seeing details such as names and education details. You will be asked to answer a few questions specifically designed to test the skills we are looking for in the person specification.

Your answers will be anonymised (all identifying information will be removed) and randomised; reviewers will score each answer against the skills specified for each question. We would like answers written by applicants, with minimal use of generative AI tools. All responses will be assessed individually and scored by members of our team

You will also be asked to upload your CV as part of the application process, but reviewers will only see your CV if your scores are high enough to be shortlisted. [You can read more about the principles behind the blind review process here.](#)

If you require any reasonable adjustments to be able to access any part of this process, you can let us know through Applied.

Mindful Employer

We are an equal opportunities employer and Mindful Employer and welcome applications from all, including those with lived experience of a mental health condition and other under-represented groups. We are happy to discuss any reasonable adjustments individuals may require in the recruitment process or once in post.

If you have any questions about the role please get in touch with:

Brian Semple, Head of External Affairs and Income,
brian.semple@moneyandmentalhealth.org