



# Candidate Pack



## Senior Systems and Transformation Manager

**Reports to:** Finance & Operations Director

**Location:** Anywhere in the UK, with occasional access to one of our offices in Glasgow, Birmingham, Southampton or London

**Duration:** Permanent

**Salary:** £50,000 - £55,000

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An introduction to our organisation, its mission, and values.
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# Letter from our CEO

Dear Candidate,

Thank you so much for your interest in MyBnk.

MyBnk is a UK wide charity that delivers expert-led financial education programmes to 5–25-year-olds. Our mission is to empower young people to take charge of their future by bringing money to life through innovative, high impact and energetic programmes. We deliver to anyone but maintain a focus on those in need.

## **This means we try and target:**

- School children with low financial capability – who need help most.
- Young adults in the greatest need – those who cannot afford mistakes.

## **Our research shows that the best time to make a difference is:**

- With the very young and when habits are set.
- Aged 11-16 when you are increasingly engaging with money and preparing for the future.
- All young adults entering independence who are making choices, now.

## **We have three Directorates that support the organisation:**

- Programme and Delivery Directorate
- Fundraising and Communications Directorate
- Finance and Resources Directorate

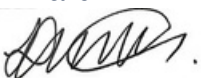
You will be joining a great team of people who are motivated to help level the playing field for young people. We encourage people of all backgrounds to apply for roles at MyBnk, and have a staff led Equality, Diversity and Inclusion committee which you will be most welcome to join.

MyBnk is a growing organisation; in every sense of the word and the future for us is set to be very exciting and promising – we need your help to shape it.

If there are any adaptations 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.





# Who are MyBnk?



Watch the video to find out more about who we are



## Our Vision:

A financially capable generation.

## Our Mission:

To empower young people to take charge of their future by bringing money to life.

# Our Programmes

## School aged children and young people

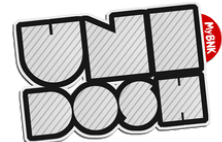
### Primary



### 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 young adults in vulnerable circumstances 'survival' money skills and knowledge that they can implement immediately in their transition into independent living

# Impact & delivery



Impact Report 2022/23

## 37,025

young people supported through our financial education programmes in 2022/23

## Our work across the UK

MyBnk continue to expand nationally reaching young people in all our UK nations.



**1891**

programmes delivered - more than 7 per day



**37%**

hours in schools



**63%**

hours with 16-25 year olds



**9098**

delivery hours



**Over 120**  
local councils worked with



**2099**  
money management accreditations

# The Operations Team



**Manfred Meyer**

**Finance &  
Operations Director**

**Senior Systems &  
Transformation Manager**

**Database Manager**

**Operations Officer**

**Operations Assistant  
(VACANT)**

# Equality, Diversity & Inclusion

MyBnk is dedicated to building an inclusive culture and working environment that promotes a sense of safety and belonging for our staff to feel supported to achieve their potential. We know there is further to go.

In 2020, MyBnk established an Anti-Racism Committee, which worked with the wider MyBnk team to present companywide actions and recommendations to ensure that we are listening, learning and constantly evolving to root out and tackle racism in all its forms. In 2022, we created a staff-led Equality, Diversity and Inclusivity committee to continue and build on this work.

We know that having an inclusive environment with diverse perspectives is essential in robust decision making, so we're inclusive in how we engage our staff, supporters, volunteers and young people when making decisions.

We want to ensure that our staff represent the young people they support so they can provide meaningful, authentic education opportunities. We therefore encourage applications from all backgrounds, particularly those with lived experience of disadvantage.

## Our Values:

1. **Respectful:** I am respectful and acknowledge that the needs of others may be different to my own.
2. **Committed:** I stretch and challenge myself in the boundaries of my role and am committed to supporting the team.
3. **Brave:** I am brave, speaking up and cultivating self-awareness at work.
4. **Accountable:** I am accountable for my actions and strive to understand the impact of my work on others.
5. **Empathic:** I show empathy to my colleagues and cultivate kindness at work.





## Overall purpose of the role:

As the Senior Systems and Transformation Manager, you will bring a wide range of experiences in managing major change projects with skills to use agile and waterfall approaches. You will be asked to implement an organisation wide approach to project management and your work will increase efficiency across MyBnk. Process automation and the integration of AI in our workstreams is high on the agenda and you will be expected to initiate and lead on these developments.

You will be writing MyBnk's ICT strategy, and together with our Data Manager you will ensure our CRM system Salesforce enables us to harvest and use data in furtherance of our objectives across all teams. You will possess strong technology architecture and development experience. Your strong, interpersonal skills will enable you to drive clear communication between stakeholders and ensure timely and on budget delivery of projects. You will be passionate about MyBnk's aims and objectives and committed to working within a growing team that goes the extra mile.



# Key responsibilities:

## Project and Transformation Management

- Lead on the development of an effective project management framework for the organisation and ensure this is embedded across MyBnk.
- Change management: MyBnk is a growing and developing organisation and guiding the organisation through phases of transition together with the Senior Leadership Team is an important part of the job.
- Create and deliver clear, consistent change communication plans to keep all relevant parties informed and engaged throughout transition processes.
- Identify gaps in processes and procedures and work with the Senior Leadership team to prioritise and find practical and workable solutions.
- Evaluate business requirements and provide timing and cost estimates for delivering them as fully functioning digital solutions.
- Develop and implement a ticketing approach for all business services functions as well as the wider organisation for example in project management, AI integration, customer service functionality, internal event management.

## Tech Systems Oversight

- This role leads the ongoing development of our Salesforce platform including streamlining workflow processes, integrating web sites with Salesforce APIs, and helping MyBnk to become more data-driven by introducing improved analytics capabilities.
- Own the maintenance, support and development of existing technology platforms and solutions.
- Drive increasing automation of manual processes and integration of various systems, using AI where appropriate.
- Ensure strong quality assurance practices are implemented to deliver working software.
- Manage relationships with technology consultants, contractors, and suppliers and ensure we continue to get the best level of service from them.
- Create, maintain, and deliver good training and guidance to others on new and existing digital solutions.

# Working across MyBnk

- Work with colleagues across the country as we continue to develop and grow the organisation.
- Support the whole team not just in technology projects but across all teams and areas of work.
- 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.
- Work as part of the Senior Management Team.
- You will need a fluent command of English and the right to work in the UK.

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

You do not need to be an expert in financial education. We will provide all the training you need. You may also have the opportunity to undertake formal accredited training.

## The ideal candidate will possess:

### Experience

- Successful development and conclusion of significant organisational projects using Agile or Waterfall frameworks as appropriate including utilising Sprint or other methodologies.
- Demonstrable experience of successfully facilitating technology implementations.
- Transitional efficiency
- Good knowledge of SQL systems is essential, we work with Salesforce CRM.
- Experience in software development using modern web development standards such as HTML, CSS and Javascript and familiarity with the LAMP would be useful to support our online learning offer.

### Skills and abilities

- Excellent project management skills with the ability to effectively prioritise and manage workload.
- Strong analytical skills that allow to find root causes of operational problems and quickly determine efficient solutions.
- Excellent documentation and training material development skills along with the ability to lead workshops, drive change, manage risks and report on progress and KPIs.



- Confidence to explore AI solutions to automate processes where possible.
- Empathy and understanding of people's motivations and blockers, in order to help people adopt to change.
- Working flexibly but methodically
- Champion change and better ways of working throughout all levels of the organisation in an enthusiastic manner.



# Benefits



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



**Flexible working policy.**



**Income protection insurance.**



**Death in service insurance.**



**Cash Health plan.**



**Annual training allowance.**



**Enhanced maternity, paternity and adoption leave and pay.**



**Pension scheme.**



**Season ticket loans.**



**Cycle to work scheme.**



**Mental Health support, access to counsellors and in-house mental health first aiders.**



# How to apply



## Information Session

Manfred Meyer is the hiring manager for this role and will be holding an information session on 4th July at 12:30pm for all those who are interested in applying. Click on the 'Webinar' image on the right for more details.

## Important dates:

The closing date for this role is: **16th July at 5pm**

First stage interviews will be held virtually on: **22nd & 23rd July**

Second stage interviews will held on: **TBC**

## To apply for this role please:

1. Click [here](#) to access our vacancies site;
2. Enter your details and submit a CV and a supporting statement that outlines how you meet the criteria for the role and your interest in MyBnk.

If you require any adjustments throughout the recruitment process, please contact MyBnk HR at [jobs@mybnk.org](mailto:jobs@mybnk.org)

If you have any other questions about the application process, please contact MyBnk HR at [jobs@mybnk.org](mailto:jobs@mybnk.org)





Address: 3 Bath Place, London, EC2A 3DR Phone number: 020 3581 9920 Email: info@mybnk.org Web: mybnk.org MyBnk is a company limited by guarantee (No. 6215005) and a registered charity (No. 1123791) - SC050175 in Scotland