



# Supporter Relations Senior Officer: Income & Operations

## Job description

<b>Grade</b>	Grade D of Minds Salary Scale
<b>Type of contract</b>	Permenant
<b>Directorate</b>	Fundraising
<b>Team</b>	Data & Supporter Relations
<b>Reports to</b>	Supporter Relations Manager: Income & Operations
<b>Responsible for</b>	4 x Permanent Supporter Relations Coordinators 1 x Fixed Term Supporter Relations Coordinator
<b>Location</b>	Flexible - hybrid mix of homeworking and time in Stratford Office
<b>Hours</b>	35hrs p/w

### About the team

The Supporter Relations team is Mind's 'one stop shop' for anyone engaging with Mind. Our purpose is to deliver an excellent supporter experience, every time. This role plays a key part in delivering the Supporter Relations ambitious new 3 year strategy.

We do this through our frontline Supporter Care team, alongside our Income & Operations team, who are responsible for handling all aspects of the donation processing procedure.

We put supporters at the heart of everything we do and champion their voice across Mind.

More widely, the Supporter Relations team sits within the Data & Supporter Relations team, responsible for driving the organisational integration with the aim of maximising impact, opportunities and income for Mind.

### About the role

Reporting to the Supporter Relations Manager: Income & Operations, you will be responsible for managing a team of four Income and Operations Coordinators. The Income and Operations team manage all aspects of the donations handling process, working closely with key internal and external stakeholders.



You will be responsible for ensuring the team achieve accurate banking and reconciliation of all fundraising income. You will ensure that service level agreements and key performance indicators are met, guaranteeing an excellent service for our internal and external customers. You will also be responsible for managing relationships with key fulfilment and response handling agencies.

Alongside team management, you will support key projects that are necessary to meet key deliverables in our Supporter Relations 3 year strategy. Finally, you will encourage a culture of continuous improvement, ensuring Mind delivers a sector leading, reliable and engaging experience.

Finally, Mind aims to ensure that the needs and interests of mental health service users, women, black and minority ethnic communities, disabled people, lesbians, gay men, bisexuals, transgender and people of all ages are reflected in all its activities. You are expected to contribute to this aim.

### **Key Responsibilities**

1. Lead on all aspects of supporter donations/fundraising relating to financial processing, recording, and responding to enquiries/queries
2. Line manage the Income & Operations team assistants, raise expectations around team performance and ensure these are delivered upon. Hold regular appraisals, supervisions and team meetings. Set objectives, identify learning and performance needs, motivate and support the wellbeing of line reports.
3. Ensure all income is processed and reconciled promptly, accurately, compliantly and revenue in accordance with Minds policies and procedures.
4. Develop and implement processes and procedures to measure and monitor performance. Ensure agreed SLA's and KPI's are being met, in line with strategic goals, undertaking clear improvement actions when they are not being met
5. Deliver necessary training, briefings and resources to allow the team to effectively handle all income processing and related tasks to the highest standard.
6. Support the Supporter Relations Manager: Income & Operations with gift aid processes, ensuring the team are maximising gift aid income, working compliantly and meeting gift aid targets and deadlines.
7. Work closely with key stakeholders to maintain a good understanding of their activities to provide a proactive and supportive service of their work. Build strong working relationships and efficient processes to meet agreed deliverables, freeing up fundraisers time and meeting shared objectives.
8. Monitor and manage arising issues, implementing solutions including interim communications and processes to minimise impact on the supporter



9. Work closely with the Income & Operations Officers to address issues and problems, implementing solutions to improve ways of working and overall supporter experience.
10. Manage a range of external suppliers (including Linney, Rapidata, DDCOS, JustGiving, Virgin, Charities Aid Foundation and others) to ensure they work to Service Level Agreements. Review performance and challenge where necessary to ensure Mind continues to receive good value for money and Supporters receive excellent customer service and experience. Make appropriate recommendations to Head of Supporter Relations
11. Be the first point of contact for our fulfilment and response handling agency, briefing new campaigns and activities
- 12.** Proactively manage queries relating to fulfilment or response handling (both internal and external) and ensure that Mind puts measures in place to prevent any future issues or potential issues
13. Have a full and expert understanding of Minds CRM (Microsoft Dynamics), its functions and its tools. Be able to troubleshoot non-technical issues and provide high level support and training to the team
14. Support fundraising colleagues in using the supporter CRM to effectively to obtain the data and information they require
15. Support the delivery and implementation of projects targeting the continuous improvement & automation of processes and systems integrations.
16. Documenting, testing and implementing new or improved business processes including training of staff/ suppliers as required.
17. Implement operational or project actions assigned by the Supporter Relations Manager: Income & Operations or Head of Supporter Reactions, enabling completion of strategic objectives
18. In collaboration with the Supporter Relations Manager: Income & Operations, deliver quarterly team reports, maximizing insight about our income & performance, as well as increasing knowledge of our work to colleagues.
19. Collate and analyse performance information as required by Supporter Relations management and other members of Fundraising management
20. Where necessary, be the team representative on cross functional projects to ensure the supporter is at the heart of everything we do. Work closely with key



stakeholders such as the Supporter Engagement team and Donor Experience Manager

21. Support team manager and officers to ensure all legal requirements for activities undertaken by the team as well as third party suppliers are being met, to protect Mind from financial and non-financial risks, including GDPR / Data Protection, PCI-DSS and Gift Aid regulations. This includes keeping up to date with sector initiatives and best practice.
22. Deputise for the team managers, assuming responsibility for the team in their absence.

This job description reflects the current scope of duties and responsibilities of the role. The post holder may be asked, and is expected, to undertake any other duties commensurate to the grade of the post. As duties and responsibilities change and develop, this job description will be reviewed and may be subject to amendment.

### **Expectations**

- To attend and contribute to team meetings, supervision and appraisal process in line with Mind's policies and procedures.
- To attend and contribute to Mind staff training and any other training identified as appropriate for the post.
- To travel to meetings in England and Wales, which may require the need to work unsociable hours, which may require the need for an overnight stay, evening and weekend work.
- To adhere to relevant legal and statutory requirements including the Data Protection Act, Health and Safety at Work Act and relevant charity law.
- To maintain an appropriate level of confidentiality at all times.
- To contribute to making Mind a greener workplace.

All members of staff at Mind are expected to embody our mission, values and competencies. This includes an expectation that they will:

- Show passion for what Mind does and the changes that we are making for people with mental health problems
- Work collaboratively across teams, departments, locations and organisations
- Stand up for what they believe is best and trust in themselves and each other



- Be open to others and ourselves and show a commitment to learning
- Be open to change and respond flexibly and quickly to the changing world
- Demonstrate organisational awareness and see the bigger picture while working towards objectives
- Communicate effectively, ensuring their messages are understood and that they strive to understand others
- Value diversity and treat others with respect, showing sensitivity towards differences, promoting and encouraging diversity, and building on people's different skills and talents to enhance the quality of their own and other's work
- Demonstrate a commitment to quality and improvement, through learning and analysis.

### **Person Specification**

#### **Essential Criteria**

##### **Experience**

1. Demonstrable experience of line managing staff including setting objectives, managing performance and staff development
2. Significant experience of providing customer service, including managing and prioritising conflicting priorities from different customers
3. Experience setting, negotiating and monitoring performance to, Service Level Agreements – both for internal teams and individuals as well as with external service providers.
4. Demonstrable experience of dealing with finances in a work context, with excellent numerical and financial skills and working with financial targets
5. Demonstrable problem solving experience, working on own initiative to identify problems and apply solutions with a focus on service improvement
6. Proven experience developing and monitoring management information reports to enable effective team performance to defined goals.
7. Substantial experience of data management, using a customer related database, querying and data manipulation
8. Extensive proven experience of managing income and data entry processes on behalf of a number of internal customers
9. Experience of implementing and maintaining data entry best practice in a complex and fast-changing charity
10. Experience of managing third party suppliers to deliver on Service Level Agreements

##### **Skills and abilities**



1. A strong team leader who is able to manage and develop individuals so that they work together as a team to deliver on the departments objectives
2. Flexible and adaptable approach, able to work independently and manage a team with minimal supervision.
3. A passion for good customer service
4. Someone who is able to cultivate strong relationships with supporters, peers and senior management
5. Excellent proven written and verbal communication in all areas with excellent attention to detail
6. Evaluation and analytical skills to be able to develop and refine business processes as required to solve arising operation issues
7. Able to simultaneously manage multiple projects
8. Target driven
9. Proven ability to act on own initiative and be proactive
10. Able to effectively recognise and respond to problems and queries
11. Strategic thinker
12. Able to meet deadlines in a dynamic environment
13. Excellent IT skills including the MS Office suite and demonstrable proficiency in the use of Customer Relationship Management databases

#### **Knowledge and understanding**

1. Working knowledge of Data Protection Act, PCI Compliance Direct Debit Guarantee, Fundraising standards/codes, Voluntary Sector Regulations and HMRC regulations
2. Working knowledge of BACS guidelines including Paperless Direct Debits
3. Working knowledge of HMRC and Gift Aid requirements
4. Up to date and detailed knowledge and understanding of fundraising and customer/Supporter Services approaches and techniques.

#### **Desirable Criteria**

1. Good knowledge of Microsoft Dynamics or similar CRM database
2. Intermediate level experience of MS Excel
3. Working in a charity fundraising environment
4. Direct or indirect experience of mental health