



# Supporter Relations Officer: Income and Operations

## Job description

<b>Grade</b>	Grade C of Minds salary scale
<b>Type of contract</b>	Fixed Term Contract – End of March 2022
<b>Directorate</b>	Fundraising
<b>Team</b>	Data & Supporter Relations
<b>Reports to</b>	Supporter Relations Senior Officer: Supporter Care
<b>Responsible for</b>	No line management responsibilities
<b>Location</b>	Flexible - likely to be hybrid mix of homeworking and time in Stratford/Cardiff 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 organising and supporting busy day-to-day operations of four Income and Operations Assistants. 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 delivering and supporting accurate banking, thanking and reconciliation of all fundraising income, ensuring that supporters stewarded appropriately and made to feel valued. The role is varied and fast-paced - efficiency, accuracy and teamwork are at heart of this role and it will require someone who is passionate, organised and efficient. You will be required to work with the Income & Operations Manager to implement improvement processes to ensure we are delivering an excellent service, every time. You will be supporting our other duties across the fundraising and external relations directorates.

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. Ensure the general smooth running of the Income & Operations team, working closely with team managers.
  - a. Responsible for creating the weekly team rota, ensuring all work streams are covered and completed within service level agreements. Provide regular updates to the Supporter Relations Senior Officer: Income & Operations on work streams and SLA's.
2. To provide support and expertise to the income and operations assistants, across all of their tasks. Act as the first point of contact for the resolution of complex queries, for the I&O assistants.
3. Assess and quality check team accuracy across all tasks, agreed service level standards
4. Work closely with colleagues across fundraising and finance in particular to ensure all income is successfully processed, accounted for and reconciled
5. Support learning and development by highlighting training gaps and areas for improvement, in line with team KPI's, SLA's and quality frameworks
6. Carry out team tasks when necessary, leading by example in efficiency and accuracy



7. Support the assistants to meet monthly reconciliation between Finance and Fundraising systems
8. Oversee Gift Aid processes, ensuring gift aid declarations are being processed accurately, maintaining a full audit trail, and to ensure eligible income is captured and maximized. To liaise with all fundraising colleagues to ensure that all claimable gift aid is recorded on the database.
9. Identify and report arising issues to Supporter Relations Senior Officer: Income & Operations, suggesting solutions including interim communications and processes to minimise impact on the supporter or internal customers.
10. Suggest innovative ways to retain, engage and excite Mind supporters, supporting implementation of new ideas
11. Manage and support any volunteers providing administrative and income processing support to the Supporter Relations Team.
12. Ensure all Income & Operations processes are documented, understood and reviewed in full, periodically.
13. Be responsible for managing stock for third party agencies and liaising directly with them on day to day processing and housekeeping issues.
14. Ensure electronic and paper records are accurate and stored securely, in line with Minds data protection policy.
15. Support the Supporter Relations Senior Officer: Income & Operations with projects targeting the continuous improvement & automation of processes and systems integrations.
16. Work collaboratively with the Supporter Relations Senior Officer: Income & Operations and wider organisation to ensure the team are well informed and briefed about all key activities, providing ease of interaction for assistants. Responsible for team resources and documentation of information and processes.
17. Deliver training to new starters and current team on new tasks, processes and activities.
18. Have a high level of understanding of Minds CRM (Microsoft Dynamics), its functions and its tools. Be able to troubleshoot non-technical issues and provide basic support and training to the team.



19. Lead informal weekly team catch ups, documenting and reporting any feedback and themes/issues to the Supporter Relations Senior Officer: Income & Operations.
20. Assisting with any project work that supports our Supporter Relations strategy
21. Deputise on behalf of Supporter Relations Senior Officer: Income & Operations when required

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
- Take responsibility for their decisions

## Person Specification

### Essential Criteria

#### Experience

1. Experience of providing excellent customer service, including managing and prioritising conflicting priorities
2. Experience of monitoring and reporting on team performance to Service Level Agreements and Key Performance Indicators
3. Experience in using your own initiative to identify problems and apply solutions to improve processes whilst aligning decisions to the organisation's policies and procedures
4. Experience in implementing actions to successfully improve team performance
5. Experience in accurately processing, coding, thanking and reconciling income, on various platforms and systems
6. Experience in documenting, updating, improving and communicating processes and procedures
7. Experience in delivering training and offering support to individuals and small groups

#### Skills and abilities

1. Ability to deal professionally and empathetically with people who have been affected by mental health, providing them with the approved health information where possible/necessary



2. Effective team player, willing to share knowledge and learning openly to create understanding and support
3. Collaborative team leader, who is able to supervise workload so that they work together as a team to deliver on the teams objectives
4. Highly motivated and self-aware individual who is committed to delivering an exceptional service to internal and external supporters and colleagues
5. Flexible approach to customer service, going above and beyond expectations
6. Excellent planning, administrative, organisational and time management skills to deliver results
7. Ability to prioritise personal and team workload, according to organisational needs
8. Accuracy and attention to detail in a busy and fast-paced working environment
9. Excellent proven written and verbal communication
10. Able to effectively recognise and respond to problems and queries
11. 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 relevant fundraising regulations
2. Working knowledge of all relevant voluntary sector regulations such as HMRC, PCI Compliance, Direct Debit Guarantee, GDPR, etc.
3. Working knowledge of Gift Aid rules and processes

### **Desirable Criteria**

1. Experience of working in a charity fundraising environment
2. Good knowledge of Dynamics or similar CRM database
3. Good knowledge of MS Excel
4. Supervisory or line management experience



5. Experience of delivering customer service training
6. Direct or indirect experience of mental health problems