

## **SAMH Role Profile**

**Job Title:** Fundraising Operations Officer  
**Job Family:** Fundraising Operations  
**Department/Service Area:** Fundraising  
**Reports to:** Fundraising Operations Manager  
**Direct Reports:** N/A

### **Role Summary**

This Fundraising Operations Officer will be integral in ensuring the successful delivery of the data and administrative functions of the Fundraising Team. You will support the Fundraising Team with data and administration to enable them to deliver their objectives, and ensure the highest standards of supporter care are delivered at all times.

### **Essential Duties and Responsibilities**

- Support the delivery of the fundraising operations strategy, supporting the existing, and informing the future approach to SAMH's fundraising.
- Support the Fundraising Operations Manager (FOM) with the management and effective use of Raisers Edge, including to the wider organisation as required.
- Assist the FOM in ensuring the use of any new technology or platforms available to fundraising team have processes in place and are implemented.
- Assist the FOM with delivery of data and insight strategies that inform all elements of supporter engagement activities, including recruitment, retention and commitment.
- Assist the FOM to maintain the database to a high level of integrity. This includes: arranging and overseeing regular data checks and cleaning; imports and exports; creating thorough documentation; and maintaining appropriate user access and security.
- Assist the FOM in designing reports and benchmark indicators for SAMH staff, along with building internal capacity to use Raisers Edge to its maximum capability.
- Assist the FOM in managing the segmentation of supporters through the effective use of categorisation and other design tools.
- Assist the FOM in delivering key monthly fundraising progress reports, to monitor the fundraising strategy and budgets.
- Assist the FOM with Gift Aid claims to HMRC on a regular basis.
- Keep informed of any legislative and regulatory changes which impact fundraising operations, including any best practice guidance through the CloF.
- Manage and deliver the processing of all donations, ensuring receipt, banking, accurate data capture and fulfilments of donations.
- Ensure donations from all channels are processed, banked and correctly coded within the fundraising database on a daily basis.
- Work with the Fundraising Operations Manager to ensure all donations are thanked by fundraising colleagues within agreed timescales.
- Maintain accurate financial records and deliver the monthly reconciliation of fundraising income with the finance department.
- Process and manage all supporter gift aid declarations, ensuring these are accurately added to database, to allow regular gift aid claims to be made.
- Provide other administrative and logistical support to the team as required
- Represent SAMH as and when required and promote the work of the organisation externally and in particular in the sector.

## **Key Working Relationships & Contacts**

The Fundraising Operations Officer will develop effective internal relationships across the Fundraising team as well as across the wider organisation, particularly the Finance team, and establish productive external relationships with key stakeholders.

## **Working Environment/ Special Circumstances**

The post will be based between Glasgow and Edinburgh. Will require the ability and willingness to travel across Scotland, and may occasionally require overnight stays away from home.

## **Experience & Qualifications**

### ***Experience***

- Demonstrable success in building effective relationships (essential)
- Ability to demonstrate flexibility and adaptability relevant to this post and experience of multi-tasking (essential)
- Experience in money handling and financial procedures (essential)
- Experience in a customer focused environment (essential)
- Experience in a similar role with data-focused objectives (essential)
- Understanding of GDPR in relation to marketing (essential)
- Experience delivering training (desirable)
- Experience of technology and platforms such as JustGiving (desirable)
- Experience of the voluntary sector and a fundraising setting (desirable)
- Understanding of supporter priorities so as to offer the best supporter care (desirable)
- Experience of working with volunteers or an understanding of and commitment to the principles of involving volunteers (desirable)

### ***Qualifications***

No formal qualifications are required, though evidence of numeracy and data skills are beneficial. Relevant experience that demonstrates the required knowledge and skills is more important.

A Raiser's Edge Fundamentals certification is desirable.

## **Knowledge & Skills**

### ***Knowledge***

- Good knowledge of databases (essential)
- Good knowledge of effective administrative procedures (essential)
- Understanding of financial procedures (essential)
- Good knowledge of Raiser's Edge or equivalent CRM systems (essential)
- Knowledge of Raiser's Edge plug-ins such as Importacular (desirable)
- Understanding of Trusts & Foundations (desirable)
- Understanding of Supporter Care principles (desirable)
- Understanding of or interest in mental health issues (desirable)
- Understanding of fundraising principles and Codes of Practice (desirable)

### ***Functional/Work-based skills***

- Excellent administrative skills (essential)

- Excellent analytical skills to interrogate data (essential)
- Excellent verbal and written communication skills and the ability to communicate with a range of internal and external stakeholders (essential)
- Technical writing skills, and ability to translate highly technical information into plain English (essential)
- Must be highly organised, with excellent attention to detail, including ability to work on own initiative and manage and prioritise workload (essential)
- Ability to build and maintain good working relationships (essential)
- Excellent IT skills across Microsoft Office, particularly Microsoft Excel, and demonstrable experience of working with databases (essential)
- Strong numeracy skills (essential)

## **Core Competencies and Commitment**

At SAMH, our values underpin everything we do. We believe that everyone has the right to be treated with dignity, respect and equality. We believe that everyone is entitled to hope and choice and to achieve personal fulfilment.

These are the competencies that SAMH looks for and expects from staff who support the people who use SAMH social care services. These competencies enable SAMH to deliver its core purpose of mental health and wellbeing for all.

Employees are required to read and understand the role profile for their position and are required to comply with SAMH's policies, all laws, rules, regulations and standards of conduct relating to their position and report any suspected violations of conduct to my line manager. All employees should adhere to the SAMH values in all interactions with service users, customers and colleagues.

## **Core Competencies, Behaviour and Skills**

### **Recovery Focussed**

Empathise, inspire and motivate others.

Deliver person centred and recovery focussed support to enable individuals to achieve positive outcomes.

### **Communication**

Communicate effectively and professionally and contribute to the accurate recording and monitoring of all case and incident recording systems. This includes communications by email, by phone/text and other on-line methods.

Build and develop positive relationships with those who use our services.

Engage with a range of people from a wide variety of backgrounds

### **Deliver a high standard/quality of work**

Maintain the highest personal and professional standards. Work professionally and collaboratively with internal and external colleagues, those who use our services and members of the public and to meet the requirements of funders and regulators.

Undertake personal responsibility for conduct and work ethic in line with SAMH Code of Conduct, the SSSC Codes of Practice and other relevant professional standards.

### **Critical Reflection and Learning**

Ability to reflect on own practice and learn from own experiences and those of others.

Develop skills and knowledge of theory and practice and understand where role fits within SAMH and externally.

### **Supportive of Equality and Diversity**

Challenge inequality and stigma; recognise and respond to the barriers individuals and groups face within society.

Treat all people within SAMH (both staff and service users) fairly and with respect regardless of their age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and/or sexual orientation.

### **Commitment to Health, Safety and Well-being**

Understand, encourage and carry out the principles of integrated safety management; comply with SAMH Health and Safety Policy and Procedure; complete all required H & S training; take personal responsibility for safety.

### **Participation**

Ensure the people who use our services have the opportunity to get involved in their support, their service, their community or in SAMH as an organisation.

### **Team Working**

Ability to work as part of a team.

### **Service User Engagement**

Develop, maintain and demonstrate a wide range of interpersonal skills when working with the people we support, including: open-minded, respectful, active listening, empathetic, promote independence, maintenance of confidentiality, honest, honourable in agreements and practices, appropriate body language, solution focussed, supportive and approachable, non-judgemental, pro-active, patience and resilience, professional approach