

<b>Role:</b> Fundraising Operations Executive	<b>Business</b> Audiences and Support
<b>Reports to:</b> Fundraising Manager - Operations	<b>Pay Band/Starting Salary:</b> Grade 4 Upper, £36,469 - £40,342 pro-rata, per annum
<b>Location:</b> Edinburgh HQ	<b>Type of Contract:</b> Permanent/ Full-time

### **JOB PURPOSE**

The wider purpose of the role is to help drive the National Trust for Scotland's ability to conserve Scotland's built and natural heritage under its care.

The specific purpose of the role is to support the development and implementation of fundraising operations to help maximise fundraising income, improve efficiency across all income streams and assist the wider team in terms of financial, data and process support.

You will work with colleagues within the fundraising team, the wider teams within the Audiences and Support Directorate and with teams across our charity to build a culture of philanthropy and ensure fundraising best practice. You will also work with appointed agencies which provide outsourced support to the Fundraising function and play a key role in database and administrative support.

### **KEY RESPONSIBILITIES AND ACCOUNTABILITIES**

Working within the Fundraising Operations team, you'll;

#### **Data/CRM**

1. Work closely with the Fundraising Operations Manager on data management tasks including CRM testing, data imports and exports, producing segmented lists for fundraising communications, and reporting.
2. Prepare and maintain fundraising-specific CRM guidance documentation and provide training to the fundraising team and external response handling teams.
3. Contribute to the implementation and improvement of data protection compliance and raise any issues regarding the team's outputs.

#### **Finance**

4. Manage tracking of expected income across the team and with Finance.
5. Co-ordinate and manage procedures for incoming donation processing, working with the Fundraising Operations Officer and Supporter Care Team in-house, and through our outsourced agency.
6. Work with the Fundraising Operations Manager and Finance colleagues to ensure accurate and timely reconciliation of all fundraised income.
7. Record and report on team expenditure, including management of purchase orders and leading on enquiries.
8. Assist the Fundraising Operations Officer with regular CRM and finance processes, particularly during peak periods.

#### **Policies, processes & projects**

9. Create and maintain Fundraising Administration processes and toolkits demonstrating initiative by making recommendations for process improvement.
10. Support the implementation of third-party platforms and new technology for use within the fundraising team.

11. With Fundraising Operations Manager, advise on and plan support for fundraising initiatives and products to ensure efficiencies and effectiveness of income generation activity is maximised.
12. Manage the Fundraising Team planner and co-ordinate Fundraising activity across the Directorate planner, co-ordinating team input to directorate wide activity including website and content requests.
13. Co-ordinate and organise team meetings.
14. Work on project-based activity which will help improve efficiencies across all fundraising practice.

### **Supporters & Suppliers**

15. Work with the Giving Campaigns and Products Executive to develop and maintain a toolkit of compelling fundraising materials and guidance for use at properties and by third-party fundraisers.
16. Be responsible for day-to-day supplier account management.
17. Often be first point of contact for donor enquiries, via phone, email and mail and must be able to communicate with supporters in a positive, proactive and professional manner which best represents our charity and the power of philanthropy.

### **Other**

18. Maintain and enhance personal knowledge, skills and networks by playing an active role in the appropriate professional bodies and internal organisational groups.
19. Have a flexible approach, with a willingness to work non-traditional hours and be available to travel in the UK.

### **REQUIRED QUALIFICATIONS, SKILLS, EXPERIENCE & KNOWLEDGE**

The above outlines the key skills the job holder will need to possess and exercise. In addition, either knowledge of or experience in the following is required:

#### Essential

1. Strong experience as a technical user of a CRM system, including managing data imports and exports.
2. Previous experience in a support or operational role in fundraising, with a good understanding of the different fundraising disciplines and income streams.
3. A confident communicator with the ability to build effective internal and external relationships.
4. Ability to deal with sensitive issues and queries with tact and discretion and deliver excellent supporter care.
5. A proactive approach to problem solving and a solution focused mindset.
6. Ability to manage time efficiently, work to deadlines and balance immediate and long-term priorities.
7. An eye for detail and a rigorous approach to process, particularly when working with supporter data and financial information.
8. Experience of process creation, management and improvement.
9. Highly proficient user of Microsoft Office software, including Word, Excel, Teams, and SharePoint.
10. Sound financial acumen and good knowledge of UK charitable giving, data protection and taxation law as applies to fundraising, and the Fundraising Codes of Practice.

#### Desirable

1. A current driving licence for driving in the UK.
2. Experience of Project Management or a relevant qualification.
3. A relevant degree, professional qualification or equivalent experience.
4. A passion for Scotland's natural, built and cultural heritage, and an enthusiasm for sharing stories and contributing to activity which will inspire others.

### **DIMENSIONS AND SCOPE OF JOB**

#### Internal Relationships

- No line management responsibility.
- You'll work closely with the Fundraising Operations Officer closely on their day-to-day work.

- You'll work with all Fundraising team members to ensure a co-ordinated and consistent approach to all fundraising activity.
- You will build strong relationships across the Audiences & Support Directorate, and across the Trust.
- You may manage office support volunteers. External Relationships
- You'll often be first point of contact for donor enquiries, via phone, email and mail and must be able to communicate with supporters in a positive, proactive and professional manner which best represents our charity and the power of philanthropy.
- You'll have frequent contact with appointed agencies and suppliers.

Financial Management

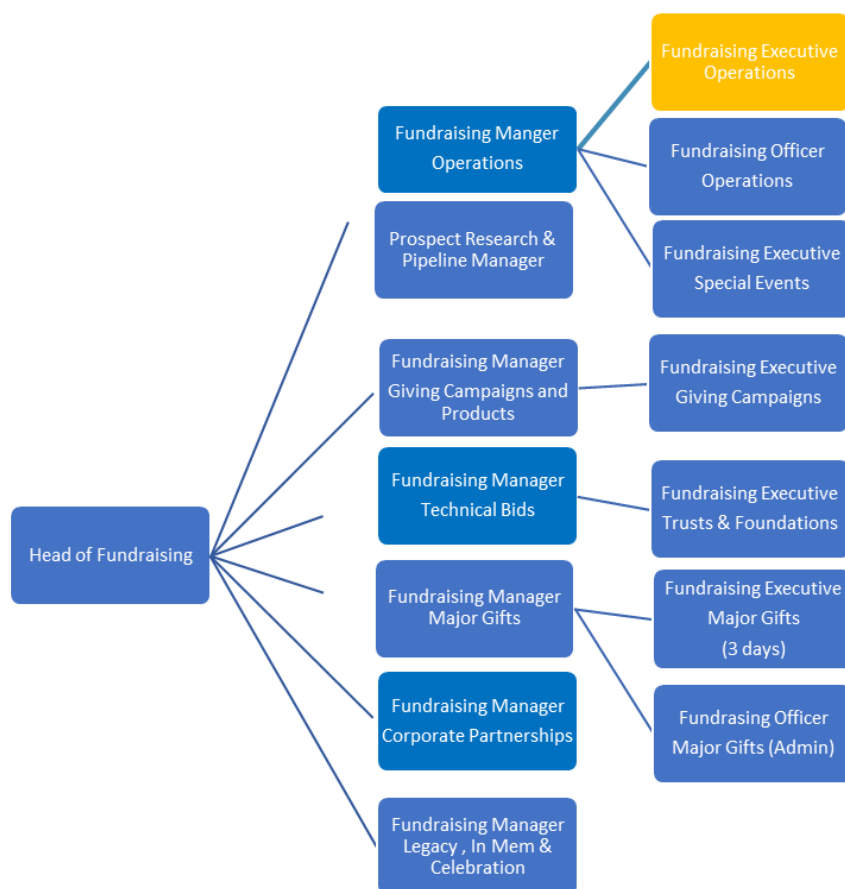
- You'll work closely with colleagues in Fundraising Operations and Finance to ensure effective reconciliation of income and expenditure.
- You will contribute to reporting on Fundraised income and expenditure.

Tools / equipment / systems

- Microsoft Dynamics CRM
- Microsoft Excel
- Microsoft Teams
- Microsoft SharePoint
- Zoom

Example key performance indicators and targets

- Meeting agreed timescale targets for reconciling income with Finance.
- Completion of planned projects within Fundraising Operations, for example, a review of all process documentation.



**The Purpose, Context, Key Responsibilities, and Person Specification reflect the requirements of the job at the time of issue. The Trust reserves the right to amend these with appropriate consultation and/or request the post-holder to undertake any activities that it believes to be reasonable within the broad scope of the job or his/her general abilities.**

### **Applications**

Interested applicants should forward their Curriculum Vitae (CV) or an Application Form to the People Services Department (Applications) by email via [workforus@nts.org.uk](mailto:workforus@nts.org.uk), by Sunday 25th August 2024. Please ensure your CV includes your full name and contact details, the CV file sent to us should be titled your first initial and surname. When submitting your CV please state the position and job location of the vacancy you are applying for in the subject title or body of your email: For example "Gardener - Culzean"