



Candidate pack

Role: Senior Fundraising Operations Executive



British Heart
Foundation



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Appointment of Senior Fundraising Operations Executive

Dear Candidate,

Thank you for your interest in our role of Senior Fundraising Operations Executive, at British Heart Foundation (BHF).

It is my privilege to lead the Marketing, Fundraising and Engagement team for one of the UK's largest charities and the nation's leading independent funder of heart and circulatory disease research.

British Heart Foundation is strong, highly effective and well respected nationally and internationally. Every day we turn to research for hope, which is funded solely by the generosity of our supporters. At BHF, we know the only way to get closer to a world free from the fear of heart and circulatory diseases is to invest in pioneering research that has the greatest potential to improve and save lives.

As our Senior Fundraising Operations Executive, you will support operations for high value fundraising activity across the Corporate, Community, and Philanthropy teams. This includes project planning, evaluation, training, and database management. The role reports to the Operations Manager and is part of a team that provides support to fundraisers in systems, processes, and planning.


We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.

BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy, Igniting Change, which sets out a roadmap of the changes we want to see by 2025. Our growing commitment to equality and diversity spans across our organisation and we pride ourselves in being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Claire Sadler
Chief Marketing and Fundraising Officer





"CPR and heart surgery saved my life when I was six. Research made that happen." - Jady Briggs

About British Heart Foundation

For more than 60 years, British Heart Foundation has been at the forefront of cutting-edge research that has saved and improved millions of lives. But, despite this progress, our work is needed more than ever today. Over 7 million people are living with heart and circulatory diseases in the UK - that's our parents, grandparents, children and siblings. Heart and circulatory conditions remain the biggest killers globally.

We raise money to fund research that helps to save and improve lives, and to support people affected by heart and circulatory diseases. These diseases can affect anyone.

For over 60 years we've been a leading independent funder of research into heart and circulatory diseases. We are the UK's largest charity retailer with around 700 stores, an employee base of over 4,000, supported by a further 18,000 volunteers.

Our lifesaving work is primarily advanced through long-term investment in medical research. We have £437 million of BHF-funded research underway, with an aspiration to invest in excess of £1 billion in research over the next ten years.

We have so much to be proud of. But we know we're just scratching the surface of our true potential. And the challenges we face are as grave as ever.

There is nothing more precious than our hearts. But the tragic reality is that millions of people's hearts are at risk. Mounting numbers of people face an agonising wait for care, while many more live in hope of treatments and cures that could save or improve their lives.

At the same time, we stand at the precipice of revolutionary scientific advances. From unleashing the power of artificial intelligence (AI) and Data Science which could stop heart attacks and strokes, to finding revolutionary gene editing cures to end sudden cardiac death.

We need more support. By joining British Heart Foundation, you could help us bring hope to people living with heart and circulatory diseases in the UK.



Being a responsible charity

We've become a more socially, environmentally and financially sustainable organisation.

Our core purpose is to save and improve the lives of people affected by heart and circulatory diseases. We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

Climate change, environmental sustainability and social inequality are some of the critical challenges of our time and are clearly highlighted in the UN's Sustainable Development Goals. Our own health is dependent on the planet we inhabit, and the way societies are structured, which are often unfair and unequal on its people. We recognise our responsibility and the important role we play in tackling these issues.

Our strategy to 2030 highlights our commitment to being a healthy and inclusive place to work and a leading force for good in society. We are proud of our progress in the area. Our retail activities contribute significantly to the UK's economy and communities. Our EDI 'Igniting Change' strategy demonstrates

our commitment to improving equality, diversity and inclusion in all areas of our work, and we have programmes underway to reduce the environmental impact in many areas – from our transport to our supply chains. But we want and need to do more.

In response to soaring energy costs, we formed an Energy Efficiency Task Force and launched an energy awareness campaign, You Have the Power, to share energy saving information with BHF colleagues and volunteers.

Overall we were able to reduce our consumption by 10% over 2022-23. We will continue to explore energy efficiency improvements and to give our staff and volunteers more power to reduce energy consumption while providing a safe and comfortable working environment.

Funding animal research is not a decision we take lightly. You can read more relating to our commitments in research [here](#).

Our strategy to 2030

Inspiring support, accelerating breakthroughs,
saving lives.

BHF has never been more needed.
But we're poised and ready to meet this
moment.

Our strategy is a commitment to
helping achieve this vision, and sets
out the objectives and activities we will
prioritise in the years ahead.



Connecting the dots in research

Research requires connections – and bold initiatives. We committed £116m of new funding to research in 2022/23, including a once-in-a-generation £30m research grant to CureHeart. This global team of pioneering researchers seeks the world's first cures for inherited heart muscle diseases. This demonstrates how much can be achieved when brilliant people come together.

Our commitment to funding lifesaving research has grown thanks to significant income recovery from retail, fundraising and legacies

But BHF has never been more needed. We're poised and ready to meet this moment. As a BHF team, we have everything we need united behind a shared vision. We will continue to fund world-class research to save and improve lives.

We will focus on:

- Helping the cardiovascular research ecosystem recover and grow.
- Progressing our ambitions around equality, diversity and inclusion in cardiovascular research.
- Enhancing knowledge of cardiovascular diseases.
- Implementing partnership initiatives to address unmet need e.g. with the UK Dementia Research Institute, Medical Research Council (MRC) and Innovate UK.
- Seeing more BHF-funded research discoveries being translated into patient and public benefit.
- Developing a research translation strategy, to increase the commercial exposure and translation of BHF-funded research towards patient benefit.

We want
more people to
survive a heart
attack

5

Every five minutes someone
is admitted to a UK hospital
due to a heart attack



Heart health matters

More than seven million people live with heart and circulatory diseases in the UK today. Millions more have risk factors for these conditions, such as high blood pressure, raised cholesterol, and type 2 diabetes. Given the immense scale of this public health challenge, what can we do to ensure that everyone has access to the personalised, optimised, prioritised care they need?

Our analysis into the impact of the pandemic shows that the cardiovascular workforce is one of the most important factors affecting patient care and something heart patients want to see addressed.

Our continued focus to promote information and provide support to heart and circulatory disease patients will be accelerated by:

- Increasing people's chances of surviving out-of-hospital cardiac arrest (OHCA).
- Scaling RevivR (our accessible, digital CPR training product) to engage with different audiences.
- Helping more people to manage their cardiovascular condition.
- Ensure BHF is meeting patient requirements at key points of need with our information and support offer.
- Supporting people to reduce their risk of cardiovascular disease.
- Targeting policy development and influencing, particularly in relation to hypertension, obesity and the NHS workforce.

We want

everyone to know
their numbers

5

As many as 5 million people
are living with undiagnosed
high blood pressure in the UK



Our mighty network of support

Our amazing fundraisers, shoppers and supporters are the beating heart of everything we do. Their passion, determination, and belief in our mission make lifesaving breakthroughs possible. And even during the toughest times, faced with a myriad of economic challenges, our supporters continue to run, swim, cycle, shop and rally together for people affected by heart and circulatory diseases.

Thanks to the phenomenal efforts of our staff, volunteers, partners and our supporters, we generated an incredible £144m net income over 2022-23 to power our lifesaving work. Our razor-sharp focus to work in partnership and accelerate fundraising in a bid to save even more lives has never been more crucial.

We will continue to focus our attention on raising awareness of our mission and raising funds to power our lifesaving science by:

- **Generating more fundraising income, with an increased proportion from high value audiences.**
- **Focussing on integrated moments to drive income and greater consideration to donate.**
- **Generating more income from our commercial operations, with an increased proportion from online retail.**
- **Continue our new shop and store opening programme.**
- **Ensuring our supporters have an outstanding experience.**
- **Improving our understanding of supporters and personalising our offer through smarter marketing technology.**

We want
to tackle vascular
dementia

13,000

Vascular dementia causes more than 13,000 deaths each year in the UK. People with a family history of coronary heart disease are significantly more likely to develop vascular dementia

United together in our mission

We want BHF to be a safe, healthy, and inclusive workplace.

Our EDI strategy, Igniting Change, is a commitment to embed equality, diversity and inclusion into everything we do. We want to create an environment where everyone who works with us can succeed, regardless of their background. One of the ways we do this is by developing an open and inclusive culture.

We are clear about our direction and what we need to achieve. We are Team BHF, we have a shared goal, supported by streamlined processes, a culture of continuous improvement and living our BHF values through everything we do. We're stronger working together.

We can inspire support, accelerate breakthroughs and save lives, when we work together. Team BHF is united in our shared vision and we'll continue to focus on these key areas that will help drive our performance forward by:

- **Delivering an outstanding people experience.**
- **Planning strategically for the skills, capabilities and talent BHF needs to thrive in the future.**
- **Accelerating our digital and technology transformation.**
- **Embedding solid technology foundations, delivering greater interconnectivity between teams, increased pace and improved customer engagement and satisfaction.**
- **Continuing to increase our social, environmental, and financial sustainability.**





Team BHF attending
Birmingham Pride 2023

Equality, diversity & inclusion

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

Reducing heart and circulatory disease health inequalities is an important part of our strategy to 2030. The ongoing work of Kaleidoscope, our equality, diversity and inclusion group, as well as our Research Inequalities Working Group, demonstrate our commitments to improve equality, diversity and inclusion for our staff, our volunteers, and our funding activities. We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy, Igniting Change, sets out our roadmap of the changes we want to see by 2025.

Our Kaleidoscope group is made up of representatives from across the organisation. Our activities encompass accessibility to work and progression for those with care responsibilities, working parents, those with disabilities and long term health conditions, different age groups, those from underrepresented ethnic backgrounds, LGBTQ+ individuals and many more forms of diversity, visible and invisible.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQ+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

Whilst working for BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day.

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.

Building an inclusive and supportive environment

Many heart and circulatory diseases are diseases of inequality. We are committed to funding lifesaving science for everyone, and we are committed to being an inclusive employer.

At BHF we want to ensure our workforce reflects the general population of the United Kingdom, so we can better represent the experiences and voices of the communities we support. A more diverse, inclusive, and fair BHF will not only improve the quality of what we do, but the impact we have.

Staff engagement

Listening to our colleagues, and understanding what matters, is always the first step in improving the employee experience.

Our wide-ranging employee survey received record support (69%), and attracted 19,000 comments and views. Our engagement score, one of the most important measures we track, was maintained at 7.5 out of 10.

Heartfest

In June 2022 we held our first Heartfest, an online festival that brought BHF colleagues together to celebrate our work and give everyone a chance to reconnect with each other and to our cause. The various interactive sessions featured colleagues, patients, researchers and supporters sharing inspiring stories, with music and wellbeing sessions adding to the festival feel.

Heartfest returned in 2023, bigger and better, and incorporated both online and in person events at BHF offices and shops across the UK.



Becky's story

Becky Newham, Senior Manager, Planning and Performance: "I'm 38 and have been living with sight loss since the age of 8. I've worked with various individuals across the organisation to raise awareness of some of the challenges I face and improve some of our ways of working. For me to be fully included it requires support from everyone on an ongoing basis."

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQ+ community. BHF colleagues took part in Pride events across the country, including Edinburgh, Birmingham and London Pride events.

These are our values

We are proud that the work we do is funding groundbreaking, lifesaving research that one day could see a world free from the fear of heart and circulatory diseases, including conditions such as heart attacks, stroke and vascular dementia.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the science that keeps millions of hearts beating.



We're brave

We speak out. We're decisive. We're innovative.



We're compassionate

We're open and honest. We respect others. We care.



We're informed

We're clear. We're open minded. We're work together.



We're driven

We're focused. We're determined. We keep learning.



Our benefits

We all achieve more together when we're happy and healthy

As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here.

Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Healthcare

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family leave

We offer 12-weeks' pay package for all family leave including maternity, paternity and adoption leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring responsibilities, bereavement, and specialised medical appointments.



Pension

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.



Job specification

Job description

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|--------------------------|--|-----------------------|--------|
| Job title | Senior Fundraising Operations Executive | | |
| Directorate | Marketing, Fundraising and Engagement | | |
| Team | High Value Operations | | |
| Reporting to | High Value Operations | No. of direct reports | N/A |
| Agility contract type | Blended (Home and Office) | | |
| Location | Dual location - Home and London Office (NW1 7AW) | | |
| Budgetary responsibility | N/A | | |
| Job level | 6 | Date | Apr 24 |

Role summary

The Senior Fundraising Operations Executive will support operations for high value fundraising activity, covering the Corporate, Community and Philanthropy teams.

This role reports into the Operations Manager in the High Value Operations team, which supports high value activity across the Corporate, Community and Philanthropy teams. The High Value Operations team provides expert support to fundraisers in the areas of systems, processes and planning to enable efficient and effective high value donor facing activity. We have ambitions to grow our high value income significantly over the next five years.

This role will support a range of regular and project based operational activity, primarily focusing on the Corporate and Community teams. This includes project planning and evaluation, inductions and training programmes, contracting and risk management related to partners/supporters, reporting on the team's prospect management and supporter engagement, batching income and expenditure, and other key high value operational projects as required.

Responsible for ensuring the database is being used correctly and consistently by the Corporate and Community teams and work with the Operations Manager and central database team to make improvements and respond to requests from across the team, including training.

Another key part of this role is keeping the centralised information hub for fundraisers updated. This role involves innovation, problem solving and process support to pursue efficient and best practice ways of working.



Key responsibilities

Planning and Processes

- Maintain a team planning tool and centralised planning and processes.
- Support operational requirements to track progress, timelines, and deadlines, including evaluation of projects.
- Manage the integration of information hubs and keep them updated.

Governance and Compliance

- Complete systematic reviews of due diligence and contracts for all prospects and partners.
- Support risk register activity and audit projects as required.
- Manage licence renewals and training for sales tools.

Reporting and Analysis

- Support the Operations Manager in overseeing the prospect and partner pipeline and its progression via data monitoring and reporting.
- Support fundraisers to use the CRM system consistently and effectively.
- Work with colleagues across the team to ensure financial income reporting and monitoring is fit for purpose, and that it supports the team's strategy.
- Complete monthly expenditure reconciliations, supporting analysis to understand the impact of spending budget

Finance Processes

- Manage the payroll giving process.
- Support the contracting and manage the financial processes to deliver the card portfolio.
- Support fundraisers with income coding and batch uploads as required.
- Support fundraisers with establishing third party giving campaigns and with reconciling income through those campaigns.
- Support with ordering tools, assets, and services through the finance system.

Projects

- Work with the Operations Manager to support and implement projects to improve operational efficiency.
- Provide operational support in fundraising, stewardship and cultivation activities managed in the High Value teams.

General

- Manage stakeholder relationships successfully; ensure effective communication, prioritisation, and that work delivered is fit for purpose.
 - Assisting with administrative duties as required.
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Person specification

Knowledge, training and qualifications

- IT literate and proficient with Microsoft packages
 - Intermediate knowledge of MS Excel, MS PPT and MS Project
 - Understanding of budgets and broad financial processes
 - Knowledge of project planning and evaluation
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Experience

- Project management experience, including scoping, design, delivery, and evaluation.
 - Experience of writing a wide variety of documentation for various audiences.
 - Experience of using a CRM database, such as Raiser's Edge, Salesforce or Microsoft Dynamics, including ability to build and effectively use queries and selections. Strong experience of developing and maintaining relationship with stakeholders.
 - Experience of implementing operational processes, guidance, tools, and training.
 - Demonstrable evidence of ability to work methodically and with precision.
 - Ability to handle sensitive and confidential information with tact and discretion and within the confines of relevant legislative and organisational procedural requirements.
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Skills and attributes

- Proactive and committed team player.
 - Excellent interpersonal skills.
 - Excellent verbal and written communication skills, with the ability both to present information succinctly and objectively.
 - Strong analytical skills.
 - Good planning and time management skills, demonstrating the ability to set and manage conflicting priorities.
 - Flexible and adaptable, including the ability to adopt new skills and processes in a fast-paced environment.
 - Resilience when working under pressure.
 - Ability to work methodically and with precision.
 - Creativity and ability to think laterally to solve problems.
 - Willingness to travel when required.
 - Alignment with the British Heart Foundation's mission and values.
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Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.



How to apply

To apply for this role please use the apply button via the jobs page on our website. Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification.

All applications are managed by our Recruitment team. If you wish to speak with a member of the team regarding the role and your application please contact them on careers@bhf.org.uk

Early application is encouraged as we will review applications throughout the advertising period and reserve the right to close the advert early should we receive a sufficient number of applications.

Should you need any adjustments to the recruitment process at application stage please contact the Recruitment team on careers@bhf.org.uk



**British Heart
Foundation**