

Candidate Pack

Role: Customer Engagement Advisor &
Customer Care Advisor



British Heart
Foundation

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Appointment of Customer Engagement Advisor & Customer Care Advisor



Dear Candidate,

Thank you for your interest in our role of Customer Engagement Advisor & Customer Care Advisor 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.

Our vision is a world free from the fear of heart and circulatory diseases. A world where fewer hearts stop without warning and more of us can live well for longer with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances – we are more confident than ever.

Together, we believe we can stop the devastation for the millions affected by these conditions. All it takes is passionate people like you standing alongside us and believing in the power of research to create a better, brighter, healthier world for everyone.

We are looking for people to join both our Customer Engagement and Customer Care teams:

Customer Engagement Team: Focuses on event stewardship and fundraising within our customer service centre, proactively reaching out to event participants to offer support and ensure their journey with us is smooth and rewarding.

Customer Care Team: Serves as the first point of contact for our customers, providing essential information and support across a wide range of topics, including retail, health information, volunteering, and more.

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, setting out a roadmap of changes with want to see. Our growing commitment to equality, diversity and inclusion spans across our organisation and we pride ourselves on 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



About us

There is nothing more precious than our hearts. But millions of people's hearts in the UK are vulnerable and need our help. British Heart Foundation (BHF)'s mission is to raise money to fund research that saves and improves lives and supports people affected by heart and circulatory diseases.

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.

With over £430 million of BHF-funded research in progress, we have an aspiration to invest in excess of £1 billion in research by 2030.

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, the researchers we fund really are making science fiction a lifesaving reality. From our CureHeart programme, which offers hope of a cure to 30 million people worldwide with an inherited heart muscle disease for the first time in history, to using data science and artificial intelligence (AI) to predict heart attacks before they even happen, we're proud to be backing transformational research that is changing the world.

However, we need your support. By joining BHF, you could help us bring hope to people living with heart and circulatory diseases in the UK.

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

Jadyn Briggs



Being a responsible charity

We've continued our journey to become a more socially, environmentally and financially sustainable organisation.

Our mission 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.

Links between environmental factors and heart and circulatory diseases are clear. Research shows that extreme weather, such as intense heat and cold, have negative impacts on people living with these conditions.

We see it as a key part of our core purpose – to make sure that we carry out our lifesaving work in a responsible way. Our progress this year has included setting our commitment to be a net zero organisation by 2045, at the latest.

This covers all areas of our activities, from direct emissions, such as the heating we use in our BHF offices and stores, to the much more significant indirect emissions from within our supply chain through to how the research we fund is undertaken.

This year we have focused our work on mapping BHF's full carbon footprint. This gives us a detailed view of where and how we can make the most impact to reduce our impact.

Our roadmap to net zero has six key areas for initial focus:

- energy efficient and zero emission buildings
- zero emissions transport
- product sourcing and suppliers
- travel and logistics
- waste and circular economy
- research funding.

These commitments form an ambitious roadmap to be an ever more responsible organisation to our planet and our people.

Sometimes the research we fund may involve animals; this isn't something we take lightly and you can read more about our commitments in research [here](#).



Our strategy to 2030

Rising to unprecedented challenges

We are on a mission to protect all our hearts, so no one has to live in fear of heart and circulatory diseases.

Our strategy to 2030 has guided us in making this impact. It sets out the changes we want to see in the world by 2030, and how our work will help us achieve them.

Our vision

A world where everyone has a healthier heart for longer

Our goals

What we're trying to achieve

Stop

Stop heart disease before it starts



Save

Save more lives from heart disease



Support

Support everyone with heart disease to live a longer healthier life



Our priorities

How we'll achieve it

Inspire

Inspire support and income to power lifesaving research



Advance

Advance the scale, breadth and impact of cardiovascular research



Transform

Transform the information, care and support available to all people affected by heart conditions



Accelerate

Accelerate impact by unlocking the potential of our people, technology and culture



Belonging

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.

An important starting point is making sure BHF's workforce reflects the general population 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.

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, volunteers, and supporters, as well as 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.

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, both 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.

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. Our equality, diversity and inclusion (EDI) strategy, Igniting Change, recognises that everyone's circumstances are unique. We are committed to funding lifesaving research for everyone, and we are committed to being an inclusive employer.

Whilst working at 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

Improving diversity in research

Making the world a fairer place is an important goal, one that we are proud to contribute to by tackling inequalities in cardiovascular health, improving the diversity of our research workforce, and making BHF a more inclusive place to work. We want to have achieved greater inclusivity in the funding and the design of research, as well as in the cardiovascular research community. We have focused on collating data that defines our starting point, so we can take the right action to improve diversity.

We've published our first research funding diversity report. The report provided valuable insight that is helping us shape our future actions to address under-representation in our research community.



Staff engagement

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

Our highest scoring areas in the latest colleague engagement survey were goal setting, fair treatment, responding appropriately to instances of discrimination and that BHF has created an environment where people of diverse backgrounds can succeed.

Heartfest

In June 2022 we held our first ever 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.

Heartfest has since been a yearly event, growing each year and incorporating both online and in person events at BHF offices and shops across the UK.

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQ+ community. BHF colleagues have taken part in Pride events across the country since 2018, including Pride marches in Edinburgh, Cardiff, Belfast and London.

Wellbeing

We take immense pride in fostering an environment that prioritizes the health, safety, and wellbeing of our employees, volunteers, and customers. Our excellence in health, safety and wellbeing is about cultivating a culture where every individual feels valued and safe, and our commitment to creating a safe and healthy workspace has been recognized nationally, culminating in the prestigious ROSPA Gold Award we proudly received in 2023.

One of our standout initiatives is the “Live Well Work Well” project group, which plays a pivotal role in enhancing workplace wellbeing. This group organizes a myriad of activities and resources aimed at promoting and supporting mental, physical, social and financial health. At BHF, we believe that a safe and healthy workplace is the foundation of success. As we continue to innovate and grow, our commitment to health, safety, and wellbeing remains unwavering. Join us and be a part of an organization that not only values your professional contributions but also cares deeply about your overall wellbeing.

A flexibly connected organisation

Our flexibly connected programme allows colleagues based outside of shops and stores to work flexibly, in a way that helps unlock their best work for the cause. The programme has been engaging with our Champions network, gathering insights from colleagues through our Ways of Working Study, to continuously adapt the approach where needed. It was awarded the Best Flexible Working Strategy at the HR Excellence Awards.

Join us at BHF and be part of a team that truly cares about your wellbeing. Together, we can make a difference in the fight against heart disease while supporting each other every step of the way.



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 research that keeps millions of hearts beating.



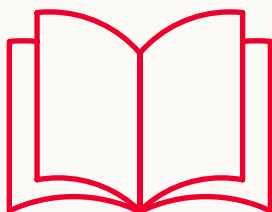
Brave

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



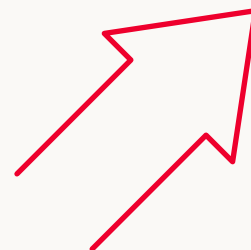
Compassionate

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



Informed

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



Driven

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

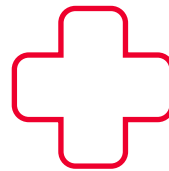
Our benefits

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.



Health care

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



Family care

We offer 12-weeks' pay package for all family leave including maternity, paternity, adoption and neonatal care 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



Pensions

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 description

Customer Engagement Advisor



Job title	Customer Engagement Advisor		
Directorate	Marketing, Fundraising and Engagement		
Team	Customer Service		
Reporting to	Customer Service Team Leader	No. of direct reports	0
Agility contract type	Hybrid - Home & Office		
Location	Dual location – Home & Birmingham Office (B37 7YE)		
Budget responsibility	N/A		
Job level	7	Date	July 2025

Role Summary

Everyone that participates in an event or supports the BHF is important, and it is essential that their experience demonstrates that.

This role will deliver an exceptional level of Customer Service and support for all British Heart Foundation (BHF) customers, supporters and fundraisers through outbound stewardship activity. Ultimately enhancing Customer Experience and delivering increased fundraising.

Key responsibilities



Customer Engagement

- Provide an exceptional Customer Experience by engaging our customers and supporters (including Fundraising, Retail and Healthcare Innovation) through outbound stewardship activity and relationship management
- Build long term relationships by engaging with our customers resulting in outstanding customer satisfaction results and increased fundraising.
- Carry out specific outbound call campaigns that meet BHF strategic vision
- Inbound support
- Be able to effectively support the Customer Care team with aspects of their role, including but not limited to taking inbound calls and answering emails when required.

Customer Data

- Use BHF's Customer Relationship Management database to keep records of all contact made, updating customers' addresses, contact preferences and all other admin needs.

Continuous Improvement

- Contribute to the continuous development of systems and processes relating to all aspects of customer service with the aim of delighting our Customers and building a long-term relationship with BHF
- Assist with continuous improvement of procedures to achieve optimum efficiency and customer service

Job description



Job title	Customer Care Advisor		
Directorate	Marketing Fundraising and Engagement		
Team	Customer Service		
Reporting to	Customer Service Team Leader	No. of direct reports	0
Agility contract type	Hybrid - Home & Office		
Location	Dual location – Home & Birmingham Office (B37 7YE)		
Budget responsibility	N/A		
Job level	7	Date	Jul 25

Role Summary

Everyone that makes contact with us at BHF is important and it is essential that they experience a level of service that demonstrates that.

This role responds to and resolves customer queries, delivering an exceptional level of Customer Service ensuring a “right first time” approach resulting in long term relationships being built with our Customers & Supporters.

Key responsibilities



Customer Care

- Ensure all inbound enquiries (including Fundraising, Retail and Healthcare Innovation) receive a prompt, efficient and helpful response within the agreed service levels
- Liaise with internal and external customers to resolve queries
- Support our customers by listening and making it easy for them with a focus on “getting it right first time”
- Contribute to Customer Satisfaction targets

Customer Data

- Use British Heart Foundation’s (BHF) Customer Relationship Management database to keep records of all contact made, updating customers’ addresses, contact preferences and all other admin needs.

Continuous Improvement

- Contribute to the continuous development of systems and processes relating to all aspects of customer service with the aim of delighting our Customers and building a long term relationship with BHF
- Assist with continuous improvement of procedures to achieve optimum efficiency and customer service

Person specification - Customer Engagement Advisor & Customer Care Advisor

Knowledge, training and qualifications



- A high standard of written and spoken English
- Good technology and IT systems knowledge, including Microsoft Office packages, databases, and data recording/inputting

Experience

- Experience in a fast-paced environment, managing multiple tasks simultaneously
- Experience working with IT systems

Would be helpful but not essential:

- Experience providing outstanding customer service, resolving queries quickly, and getting it right the first time
- Customer facing role, Contact Centre or Call Centre experience
- Familiarity with best practices in customer service, including handling inquiries, resolving complaints, and providing exceptional service
- Experience working Social Media Platforms
- Experience using social media as an engagement and marketing tool for the Customer Engagement Advisor role only

Skills and attributes



- Enthusiastic with a “can-do” positive attitude
- Desire to make a difference
- Confident to build connections and relationships
- Demonstrates empathy and patience
- Motivated by desire to support others and provide exceptional service
- Passion for delivering world-class customer service by listening and responding to our supporters queries and requests
- Strong administrative and time management skills to prioritise and manage workload
- A flexible and adaptable approach, adjusting to new situations with ease
- A collaborative team player willing to share knowledge and learning openly
- Resilient, able to persevere through setbacks and perform under pressure
- Able to use and navigate multiple technology systems
- Problem solver, able to tackle issues calmly and effectively
- Inquisitive, able to ask questions to get to the heart of the matter and check understanding
- Quick learner, able to adapt and use new information efficiently
- Proactive, able to take ownership of tasks and complete a variety of activities
- Strong interpersonal skills, able to build rapport with customers and colleagues
- Commitment to continuous improvement and personal development
- Able to demonstrate connection to the BHF values. Brave, Informed, Compassionate

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.

Data protection

During your employment, this role will encounter some personal data. The role will be permitted to access and use the following types of personal data:

- Personal details/contact information/family details
- Personal financial information - donations, gifts, bank account, card numbers
- Personal Sensitive data - health, race, ethnicity, sexual orientation, political affiliation, trade union membership, religious or philosophical beliefs, biometric or genetic data, criminal record

If you find yourself with access to personal data you are not authorised to have, you must report it to your line manager and the IT Service Desk immediately.

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**