

Job Description



Job Title:	Development Operations Officer (Finance & CRM)	
Department:	Development Office (Fundraising & Alumni Relations)	
Business Unit:	Development	
Line Manager:	Director of Development	
Job Purpose:	<p>The Operations Officer plays a central role in supporting the financial, operational and data infrastructure of the Development Office. The postholder is responsible for the accurate processing, reconciliation and reporting of all philanthropic income, alongside the effective management of the Development CRM. Working closely with the School's Finance Team, the role ensures robust financial controls, regulatory compliance and high-quality management information to support fundraising, alumni relations, and strategic decision-making.</p>	
Main Responsibilities:		
1	Finance, Income Processing and Financial Controls <ul style="list-style-type: none">Take day-to-day responsibility for the accurate processing of all fundraising related income, including donations, pledges, regular gifts, event income and campaign income.Ensure all income is correctly recorded within the Development CRM (Raiser's Edge/NXT) and reconciled regularly with the School's finance system.Prepare and submit income batches, journals and supporting documentation to Finance in line with agreed deadlines and procedures.Reconcile Development CRM income against bank statements and Finance reports, investigating and resolving discrepancies promptly.Administer and monitor pledged income, including setting up pledge schedules, tracking outstanding balances and supporting follow-up activity.Support the administration of Gift Aid claims, ensuring accurate records, audit trails and timely submission in compliance with HMRC requirements.Assist with budget monitoring and administration for the Development Office, including tracking expenditure, processing purchase orders and monitoring against budgets.	45%

	<ul style="list-style-type: none"> Support the Director/Head of Development with financial forecasting, income projections and analysis of performance against targets. Ensure strong financial governance, audit readiness and adherence to School financial policies at all times. Liaising with suppliers, ensuring that goods and services are received, dealing with returns and payments. Monitor departmental credit card, ensuring relevant paperwork is processed and passed to finance. 	
2	<p>CRM, Data Management and Reporting</p> <ul style="list-style-type: none"> Maintain the accuracy, integrity and ongoing management of supporter, alumni and donor data within the Development CRM. Oversee data entry procedures, imports, duplicate management and general housekeeping to ensure data quality and consistency, working with admin colleagues within the team. Produce accurate and insightful financial and fundraising reports (monthly, quarterly and annually) for Development leadership and senior stakeholders. Support data segmentation for appeals, events, stewardship and alumni engagement activity, ensuring mailing preferences and consent are adhered to. Proactively develop and improve systems, processes and workflows to increase efficiency, data quality and user experience. Act as the primary liaison with the CRM provider working closely with the Director of Development, managing user access, training, system issues and development opportunities. 	30%
3	<p>Compliance & Data Protection</p> <ul style="list-style-type: none"> Work with the School's Data Protection Officer and Finance Team to ensure compliance with GDPR, fundraising regulation and financial controls. Support lawful basis assessments, data retention and archiving in line with School policies and regulatory requirements. Maintain clear documentation and operational manuals relating to CRM usage, income processing and data management. Keep up to date with changes in fundraising regulation, Gift Aid guidance and data protection legislation, recommending changes to practice as required. 	15%
4	<p>Operational Support and Collaboration</p> <ul style="list-style-type: none"> Provide operational and administrative support to the Development Office as required, including support/coordination for events, alumni activities and donor enquiries. 	10%

	<ul style="list-style-type: none"> Deliver CRM and process training to Development colleagues and relevant staff as required. Build positive and professional relationships with donors, alumni, volunteers and internal stakeholders. Act as a first point of contact for enquiries received by email, telephone and face-to -face from alumni, donors, and internal stakeholders. This responsibility is shared within the team. This role will require regular out of hours working and some travel. 	
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Key Contacts and Working Relationships:

- Strong collaboration across the Development Team to support delivery of, and enhance, all outputs
- Build and maintain effective relationships with a wide range of internal and external individuals and stakeholders, particular focus on Finance and Digital teams
- Work closely with Team and School project groups to support delivery of strategic activity
- First point of contact for Finance and Data management queries
- Active member of the Blackbaud User Group, keeping up to date with new developments, legislations and best practice

Planning and Organising:

- This role will require the post holder to lead on key operational projects and activity within the team (financial and data analysis and management)
- Responsible for managing and prioritising own areas of work, delivery projects to agreed timescales
- Prepare timely reporting and forecasting analysis to the Director and Head of Development
- Support the central Finance Team with processes and requirements, particularly year-end audit
- Ensure correct and timely processing, aligned to the financial year requirements

Problem Solving and Decision Making:

- Resolve complex and routine problems relating to the database and finance systems from a range of individuals, using their own knowledge and expertise to find solutions.
- Finding new innovative solutions to streamline and enhance financial and data management processes, and training team on new processes

Resources and Requirements:

- Lead the maintenance of the database and financial operations, including developing a suite of standardised processes documentation and user guide manuals
- Required to support the team in delivery of wider activity (outside of core role), including events

- Activity delivered in-line with agreed budgets

Knowledge, Skills and Experience:

Essential:

Skills / Aptitude

- Experience in development operations, fundraising finance or income processing roles
- Strong financial literacy with experience of reconciliation, income processing and reporting
- Excellent attention to detail and high levels of accuracy
- Ability to manage multiple priorities and meet deadlines
- Confident user of CRM systems and Microsoft Office (especially Excel)
- Strong organisational and problem-solving skills
- Ability to handle confidential and sensitive information with discretion
- Clear and confident communicator, able to explain financial information to non-finance colleagues

Knowledge

- Understanding of UK charitable giving, Gift Aid and fundraising regulation
- Knowledge of GDPR and data protection as it applies to fundraising and alumni data
- Experience of producing financial and management reports
- Strong working knowledge of CRM systems (Raiser's Edge / NXT desirable)

Qualifications

- Relevant degree, professional qualification or equivalent professional experience

Desirable:

Skills / Aptitude

- Experience working in an independent school, university, or charity environment
- Experience working closely with a central Finance function

Knowledge

- Understanding of alumni relations and donor stewardship best practice

Qualifications

- Part-qualified or qualified in finance, accounting, fundraising or data/operations-related discipline