

Job Description

Job Title: Finance and Database Officer

Reporting to: Finance Director

Overall Aims of Post:

Support the finance team in ensuring consistent, accurate and timely provision of financial information to the organisation. Manage and maintain OIUKs CRM database and be the sole contact for queries and providers associated with it.

Responsibilities:

The Finance and Database Officer will be expected to:

Provide finance and administration support:

- Assist with the production of the monthly management accounts and forecasts, using excel, to include financial analysis and commentary.
- Assist with the annual budget and strategy.
- In coordination with the Programmes team, provide rigorous information on income forecasting on a monthly basis
- Provide income and expenditure tracking on specific Education and Agricultural finance project
- Report to the US/Global team on financials and forecasts as requested- to include producing a monthly donor growth report.
- Be the main point person during fundraising appeals for income monitoring and analysis providing regular updates to the team as requested.
- Assist with recording income received via post, telephone, online giving sites, BACs or direct credit onto the Progress database.
- Code and maintain accurate regular giving plans.
- Ensure the timely acknowledgement of individual donations.
- Monitor the OIUK general contact inbox.
- Assist with basic personnel administration as required.
- Provide general office assistance as required.

Manage the CRM database:

- Ensure all donor information is accurately and consistently recorded by users and carry out regular integrity checks.
- Manage imports of large new donor data



- Support the needs of Marketing and Fundraising by providing timely reporting, assisting with appropriate data capture for prospect tracking and fundraising progress reporting
- Create customised queries, as directed by the Marketing and Fundraising department, with analysis carried out using MS Excel
- Work with and support the fundraising team to manage the donor journey through the database i.e. identifying prospects for upgrade and regular cleaning of donor segments. This may also include the introduction of processes and systems to manage the donor journey most effectively.
- Work with Finance department on monthly reconciliations, ensuring gifts entered are complete and accurate.
- Support the Marketing and Fundraising team to compile all mailing lists for appeals and events based on applicable criteria.
- Maintain confidentiality of donor information.
- Set up new users and assign security levels as determined
- Provide user training and support where required, including the updating of user manuals.
- Analyse and review applications and user needs; stay abreast of software updates and hardware recommendations.
- Manage relationship with Progress service provider (ASI) and a consultancy resource where required for maintenance, upgrades and special projects.

Areas of Reporting/Liaison

- Report at agreed intervals to the Finance Director
- Liaise with all members of staff, particularly the fundraising team
- Salary range is £22k to £28k depending on skills and relevant experience.

PERSON SPECIFICATION

Job Title: Database and Finance Officer

Opportunity International and its Network of Partners, of which OI-UK is a member, are Christian-based organisations, and employees need to understand, value and appreciate the principles that underpin its vision, mission and objectives. It is not, however, a requirement that an applicant is a practising Christian.

Essential Experience

Candidates should have demonstrable knowledge of database experience in a non-profit environment for fundraising.

Candidates should have practical knowledge of accounting principles and procedures and ideally experience of using computer-based financial systems.

Excellent computer (especially MS Excel), communication and organization skills are essential as is the ability to work on one's own initiative.

Essential Skills and Knowledge

The successful candidate will have:

- Proficient in data organisation and manipulation, with close attention to detail and accuracy
- 3-5 years of CRM experience in a fundraising environment, preferably experience of Progress CRM or Raisers Edge.
- Familiarity with accounting practices, and ideally experience of computerised financial systems, preferably Sage Line 100 but training will be given.
- IT literacy of a level to be highly competent; word processing, spreadsheets, and databases.
- Good all-round communication skills.
- Proven ability to prioritise workload and to produce accurate, detailed work to deadlines.
- Willingness to work independently and as part of a team.
- Excellent interpersonal skills – the ability to liaise and build positive relationships with supporters, staff and suppliers.
- Excellent attention to detail.

Experience of work within a similar environment would be an advantage but not necessary.