

# Job Description

**Job Title:** Data & Insight Officer

**Responsible to:** Data and Insight Manager

## Job Purpose:

Responsible for maintaining and updating data within the charity's financial supporter database, ensuring information is accurate, compliant, and effectively managed. This role underpins robust KPI reporting, seamless cross-platform integration, and consistent business processes that are understood and followed by the wider team. The Data & Insight Officer will also support the delivery of more impactful, evidence-based communications by providing training and guidance to the Fundraising Team, and by producing high-quality management information to support their work.

A key aspect of this role is ensuring data hygiene and full compliance across all fundraising activities. The Data & Insight Officer will work closely with the Head of Donor Experience to implement and monitor fundraising policies and procedures, ensuring adherence to the Fundraising Code of Practice, GDPR, and the requirements of our Gambling Licence.

## Main Duties:

### CRM and Data Management

- > Support teams with the setup of fundraising campaigns and products within the CRM to ensure effective tracking and reporting.
- > Maintain the CRM to a high standard of data integrity, including performing regular data hygiene checks to ensure compliance with the Data Protection Act, GDPR, Telephone and Mail Preference Services, mortality screening, and PAF validation.
- > Oversee imports and exports of data to ensure supporter records are well and promptly maintained.
- > Maintain the CRM's internal knowledge base, user guides and FAQs.
- > Respond to supporter and internal team enquiries regarding data held on the CRM.
- > Promote database best-practice across the organisation, working with Fundraising colleagues to improve data input standards and data extraction processes.
- > Play an active part in Fundraising inductions and champion best practice use of the system.
- > Routinely audit and update supporter preference and consent data (mail, email, telephone opt-ins/opt-outs) to ensure strict adherence to GDPR and Fundraising Code of Practice.
- > Continually look for ways for us to automate and improve our use of data across Income Generation.

### Fundraising Compliance

- > Support the Data & Insight Manager and Head of Donor Experience with matters relating to the Fundraising Regulator, the Code of Fundraising Practice, and Charity Commission guidance, ensuring clear communication with colleagues and trustees.
- > Assist in overseeing and monitoring fundraising compliance procedures, ensuring policies are implemented, adhered to, and regularly reviewed, particularly in relation to updates

from the Fundraising Code of Practice, the Gambling Commission, and Data Protection legislation.

- > Support colleagues involved in new product development and digital innovation by identifying CRM system impacts and training needs to enable successful implementation of new initiatives.

## Campaigns and Reporting

- > Generate accurate supporter lists and segments from the CRM based on campaign specifications provided by fundraising teams and external agencies.
- > Provide regular campaign reports and analysis to fundraising teams, measuring key performance indicators and making recommendations for optimisation where appropriate.
- > Monitor supporter behaviour across audiences, including attrition and lifecycle trends, to inform campaign strategies and stewardship planning.
- > Support annual planning and reforecasting by providing accurate analysis of campaigns and donor groups.
- > Track the outcomes of marketing activities for specific target groups and deliver deeper analysis when required

## Infection Prevention and Control

All Employees and Volunteers of Acorns will be expected to follow all infection prevention and control policies and procedures to ensure a safe and healthy environment. This includes maintaining best hygiene practices, using personal protective equipment (PPE) as required, and adhering to safety protocols to minimise the risk of infection. It everybody's responsibility to promote a clean and safe environment for staff, children, young people and their families.

## Health and Safety

All Employees and Volunteers of Acorns are required to comply with all health and safety policies and procedures in accordance with the Health and Safety at Work Act 1974. This includes taking reasonable care of their own health and safety, as well as that of others who may be affected by their actions. The role involves using personal protective equipment (PPE) when necessary, following established safety protocols, reporting hazards or unsafe conditions, and participating in health and safety training. All Employees and Volunteers of Acorns must actively contribute to maintaining a safe and healthy environment and cooperate with the employer to ensure compliance with relevant health and safety legislation.

## Environmental sustainability

All Employees and Volunteers of Acorns are required to support in minimising environmental impact wherever possible, including recycling, switching off lights, computers, monitors and equipment when not in use. Helping to reduce paper waste by minimising printing/copying and reducing water usage, reporting faults and heating/cooling concerns promptly and minimising travel. Where the role includes the ordering and use of supplies or equipment the post holder will consider the environmental impact of purchases.

## Safeguarding

Acorns is committed to safeguarding and promoting the welfare of children and adults and expects all staff and volunteers to share this commitment. It is the responsibility of all staff to always safeguard and protect children and adults at risk, staff must report any concerns as per safeguarding policies and procedures which are available on Acorns internal systems.

Every staff member must undertake regular mandatory safeguarding training at a level relevant to their role.

### **Data Protection and Confidentiality**

All Employees and Volunteers of Acorns are required to comply with all relevant data protection laws, including the Data Protection Act 2018 and the General Data Protection Regulation (GDPR). This includes ensuring the confidentiality, integrity, and security of personal and sensitive information. All Employees and Volunteers of Acorns must handle all data in accordance with organisational policies and procedures, ensuring it is only used for its intended purpose and is not disclosed to unauthorised individuals. The role may involve safeguarding personal data, reporting any data breaches, and always maintaining strict confidentiality to protect both individuals' privacy and the organisation's legal obligations.

### **Equality, Inclusivity and Diversity**

All Employees and Volunteers of Acorns are required to promote and uphold the principles of equality, inclusivity, and diversity in all aspects of their work. This includes ensuring that all individuals are treated with respect and fairness, regardless of their race, gender, age, disability, sexual orientation, religion, or any other characteristic protected by law. All Employees and Volunteers of Acorns must comply with relevant legislation, including the Equality Act 2010, and contribute to creating an inclusive environment that values diverse perspectives. The role involves actively challenging discrimination and bias and supporting the organisation's commitment to providing equal opportunities for all.

### **Other Duties:**

- > To act as an ambassador for Acorns raising awareness of its charitable aims and objectives and enhancing its reputation through exemplary behaviour, conduct and team working.
- > To put the needs and interests of Acorns children and young people and their families first in all aspects of their work.
- > To ensure compliance with Acorns policies for diversity, employment, equal opportunities, health and safety, information governance and safeguarding.
- > To actively participate in a performance and development review process and any training and development identified to further enhance your role with Acorns.
- > Demonstrate innovation, seek continuous improvement, and share best practice with colleagues across the organisation
- > To be innovative, commit to continuous learning, researching new ideas, monitoring new technology advancements, sharing good practice across the team and colleagues.
- > To carry out any other reasonable duty as requested by your line manager.

Acorns adheres to the United Nations Convention on the Rights of the Child. As an employee you will be a Duty Bearer for Children's Rights and support all children to be Rights Holders.

## Person Specification: Data and Insight Officer

	<b>Essential</b>	<b>Desirable</b>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>&gt; A good level of education and digital confidence and capability.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Microsoft certified e.g. Power BI</li> <li>&gt; Google Data Analytics Professional Certificate</li> <li>&gt; Data science certifications</li> <li>&gt; SQL professional credentials</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>&gt; Extensive hands-on experience undertaking bulk imports and exports of data.</li> <li>&gt; Experience of leading data updates, ensuring data integrity throughout the process.</li> <li>&gt; Extensive experience of using a CRM system.</li> <li>&gt; A track record of producing reports to inform management.</li> <li>&gt; Analysis of some organisational data, producing reports on a systematic and tactical basis.</li> <li>&gt; Experience in project planning and the ability to manage multiple projects, prioritising effectively within a complex workload.</li> <li>&gt; Proactive, creative thinker with experience generating innovative solutions and encouraging this approach in others.</li> <li>&gt; Strong interpersonal and communication skills, with experience working effectively with stakeholders at all levels.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Experience of training others on database systems</li> <li>&gt; Has worked in a marketing, fundraising or customer facing background.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>&gt; Strong IT skills, particularly in MS Office and advanced Excel skills, including the use of V Look Ups, Pivot Tables and conditional formatting for data manipulation and preparation.</li> <li>&gt; Proficiency in CRM systems such as Raiser's Edge, Salesforce, Donorfory or Donorfex</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Experience with fundraising platform integrations (e.g Dotdigital, Enthuse, JustGiving)</li> <li>&gt; Understanding of fundraising compliance, including GDPR, Gambling Commission requirements and best practice</li> </ul>
<b>Skills and Abilities</b>	<ul style="list-style-type: none"> <li>&gt; High attention to detail and accuracy.</li> <li>&gt; A digital champion who is confident in learning to use new systems and help others to better utilise them.</li> <li>&gt; Excellent organisational skills with the ability to prioritise and meet deadlines.</li> <li>&gt; Confident in building positive and effective relationships with staff, supporters and stakeholders.</li> <li>&gt; Ability to work collaboratively across teams while managing multiple priorities.</li> <li>&gt; Excellent written and verbal communication skills.</li> <li>&gt; Sound numeracy skills with the ability to interpret and analyse data.</li> <li>&gt; Collaborative team player who is willing to share knowledge and learning openly to create understanding and support.</li> </ul>	
<b>Other</b>	<ul style="list-style-type: none"> <li>&gt; Passionate and committed to Acorns mission and values</li> <li>&gt; Willingness to train and learn new skills.</li> </ul>	
<b>Behaviours</b>	<ul style="list-style-type: none"> <li>&gt; Build collaborative relationships across the organisation, creating a culture of cross function working.</li> <li>&gt; Positive, enthusiastic approach &amp; can-do attitude.</li> <li>&gt; Curious, always seeking to understand and improve experience of customers.</li> <li>&gt; Open to change and continuous improvement.</li> <li>&gt; Innovative mindset and passionate about learning.</li> <li>&gt; Commitment to the Acorns strategy &amp; its success.</li> <li>&gt; Driven in your approach to strive for excellence and build lasting partnerships for Acorns.</li> </ul>	

## Terms and Conditions of Employment

**Job Title:** Data and Insights Officer

**Responsible To:** Data and Insight Manager

**Location:**  
Acorns House  
103 Oak Tree Lane  
Birmingham  
B29 6HZ

**Salary:** £30,500 per annum

**Notice:** 8 weeks

**Hours:** 37.5 hours per week

**Holidays:** 27 days plus statutory bank holidays

**Pension:** Contribution to Group Personal Pension Plan or NHS Pension Scheme (if already in scheme).

**Life Assurance:** Acorns Group Life Assurance Scheme or NHS Pension Scheme Life Assurance cover (if already in scheme)

All terms and conditions will be detailed in writing together with Employee Handbook which must be read and observed.