


## Job Description



<b>Job Title:</b>	Data and Insight Manager
<b>Responsible to:</b>	Head of Donor Experience
<b>Direct Reports:</b>	Data Analyst Data and Insight Officer

### Job Purpose:

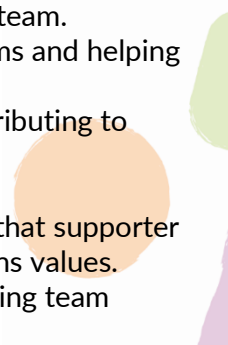
The Data & Insight Manager will oversee, optimise, and continually develop Acorns digital and CRM strategy, ensuring the effective implementation of fundraising systems, processes, financial coding and business reporting requirements. This role is vital in ensuring our CRM platform enhances supporter engagement through insight-driven communications, accurate record management, reliable KPI and financial reporting, and smooth cross-platform integration. The post holder will also ensure that robust business processes and rules are in place, clearly understood, and consistently followed across the team.

By providing the fundraising team and wider organisation with high-quality data, meaningful insights and actionable reporting, the Data & Insight Manager will support data-led decision making, optimise supporter experience and campaign performance, and enable more impactful, evidence-based communications that strengthen supporters' connection with Acorns. The role will work collaboratively across teams to ensure insight is used effectively to shape fundraising strategy, improve engagement outcomes and support long-term supporter value, helping us continue to provide exceptional specialist care to every child and family who needs us, now and in the future.

A core element of the role is ensuring full compliance across all fundraising activities. The Data & Insight Manager will support the Head of Donor Experience to implement and monitor fundraising policies and procedures. They will also collaborate closely with the Finance team to support budgeting and monthly reconciliation processes including Gift Aid claims.

### Main Duties:

#### Leadership

- > Provide strong leadership, mentoring, and development for the Data Analyst and Data and Insight Officer, fostering a high-performing, motivated, and collaborative team.
  - > Be a digital champion – supporting best practice and use of Acorns systems and helping others build skills and confidence.
  - > Play an active role within the wider Fundraising Management Team, contributing to organisational initiatives and strategic objectives.
  - > Support and deputise for the Head of Donor Experience as required.
  - > Champion a culture of donor-centricity across the organisation, ensuring that supporter communications reflect consistent tone, quality, and alignment with Acorns values.
  - > Lead the development and delivery of CRM and systems training, appointing team champions to support ongoing training and skills development.
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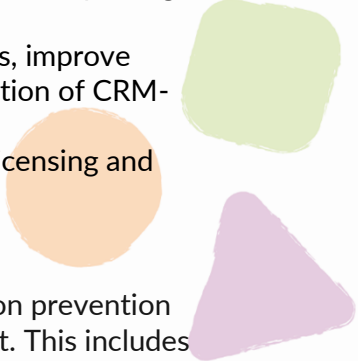
## CRM and Data Management

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- > Lead the day-to-day relationship with all CRM and associated platform vendors, ensuring service delivery aligns with Acorns Data Roadmap and budget.
  - > Develop dashboards and reporting frameworks that provide actionable insights and KPIs to Fundraising, Senior Management and the Board of Trustees.
  - > Ensure data hygiene remains a core priority, embedding consistent processes for regular data cleansing and supporter record maintenance.
  - > Lead the team to deliver data redaction, cleansing, migration, and integration projects.
  - > Continuously assess CRM processes, systems, and technologies to maximise efficiency, optimise CRM performance, streamline workflows, support fundraising delivery and enhance user experience.
  - > Utilise SQL and other data query tools to support advanced reporting, data analysis, system optimisation, and the identification of operational efficiencies across CRM and integrated platforms.
  - > Collaborate with the Head of Donor Experience and Donor Experience Manager to develop financial and behavioural segmentation strategies that optimise donor engagement and support.
  - > Lead CRM and multi-platform integration across key stakeholder groups including Fundraising, ICT, Finance and Marketing, ensuring seamless implementation, development and optimisation.
  - > Support the Head of Donor Experience in embedding Information Governance requirements into Fundraising operations and represent the Directorate on relevant project groups.

## Fundraising Compliance


- > Act as the responsible lead for matters relating to the Fundraising Regulator, the Code of Fundraising Practice, and Charity Commission guidance, ensuring clear communication with colleagues and trustees.
- > Work with the Head of Donor Experience to oversee and monitor fundraising compliance procedures, ensuring they are implemented, adhered to, and regularly reviewed, especially in relation to updates from the Fundraising Code of Practice, the Gambling Commission and Data Protection legislation.
- > Support colleagues responsible for new product development and digital innovation, identifying system impacts and training needs to enable successful rollout of new initiatives.

## Budgets and Reporting

- > Develop and monitor expenditure budgets and feed into the monthly financial reporting cycle, reforecasts, and annual planning processes.
  - > Collaborate with Finance to identify cross-platform and system efficiencies, improve income processing and reconciliation workflows, and support the optimisation of CRM-related financial reporting procedures.
  - > Manage the CRM and Data budget, including vendor contracts, software licensing and external consultancy expenditure.
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## 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

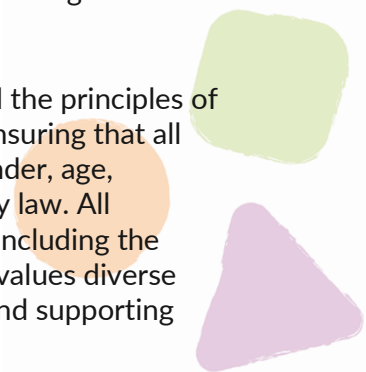
Acorns is committed to safeguarding and promoting the welfare of children and adults and expects all staff and volunteers to share this commitment. It is the responsibility of all staff to always safeguard and protect children and adults at risk, staff must report any concerns as per safeguarding policies 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:**

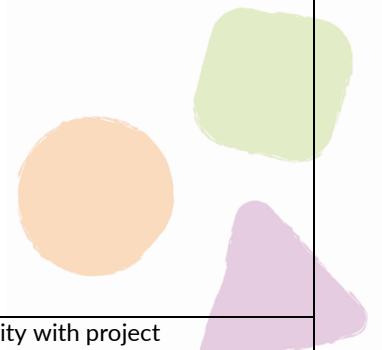
- > To act as an ambassador for Acorns raising awareness of its charitable aims and objectives and enhancing its reputation through exemplary behaviour, conduct and team working.
- > To put the needs and interests of Acorns children and young people and their families first in all aspects of their work.
- > 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.
- > Promote a coaching culture within Acorns.
- > 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 Manager

	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>&gt; Graduate qualification in IT, Data Science, Statistics/Business Analytics or related subject (or equivalent experience)</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 experience in CRM management, system automation, and associated business processes.</li> <li>&gt; Proficient in using analytics, segmentation tools and data-driven decision-making.</li> <li>&gt; Ability to configure, customise, and optimise workflows, dashboards, and reports.</li> <li>&gt; High levels of digital and technical skills with the ability to train and manage others in highly technical roles, including experience using SQL or similar data query tools to support advanced reporting, data analysis, CRM optimisation and process efficiencies.</li> <li>&gt; Experience of championing and maximising the use of systems across and organisation and ensure data hygiene.</li> <li>&gt; Understanding of customer lifecycles, supporter journeys, and lifetime value measurement.</li> <li>&gt; Exceptional written and verbal communication skills, with experience creating engaging and informative content for key stakeholders.</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, communication and negotiation skills, with experience working effectively with stakeholders at all levels.</li> <li>&gt; Proven experience integrating CRM systems with key digital tools, including websites, donation pages, marketing automation platforms and payment gateways.</li> <li>&gt; Strong expertise in business process mapping, documentation and creation of standard operating procedures for data entry and reporting.</li> <li>&gt; Experience of training technical and non-technical teams and ensuring consistency of use.</li> <li>&gt; Demonstrable experience in line managing and mentoring of technical staff.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Experience of board reporting and developing KPI tracking dashboards/scorecards.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>&gt; Experience working within a successful fundraising or marketing environment.</li> <li>&gt; Strong IT skills, particularly in MS Office and Excel.</li> <li>&gt; Proficiency in CRM systems such as Raiser's Edge, Salesforce, Donorfy or Donorflex.</li> <li>&gt; Advanced skills in creating dashboards and KPIs within the CRM.</li> <li>&gt; Ability to use BI tools (e.g., Power BI, Tableau) for deeper analytics, alongside SQL/data query tools to deliver deeper analytics, reporting and operational insight.</li> <li>&gt; Experience with fundraising platform integrations (e.g., Dotdigital, Enthuse, JustGiving).</li> <li>&gt; Strong understanding of fundraising compliance, including GDPR, Gambling Commission requirements and best practice.</li> </ul>	
<b>Skills and</b>	<ul style="list-style-type: none"> <li>&gt; Excellent organisational skills with the ability to prioritise and meet deadlines.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Familiarity with project management systems such as Asana</li> </ul>



	Essential	Desirable
<b>Abilities</b>	<ul style="list-style-type: none"> <li>&gt; Strong customer-care ethos, including an empathetic and professional telephone manner.</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; High attention to detail and accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Familiarity with using agile methodologies or similar to find solutions and plan across teams and directorates.</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>&gt; Passionate and committed to Acorns mission and values</li> <li>&gt; A willingness and ability to travel independently throughout the organisation and to meetings, presentations, and events.</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

<b>Job Title:</b>	Data and Insight Manager
<b>Responsible To:</b>	Head of Donor Experience
<b>Location:</b>	Acorns House 103 Oak Tree Lane Birmingham B29 6HZ
<b>Salary:</b>	£46,350 per annum
<b>Notice:</b>	12 weeks
<b>Hours:</b>	37.5 hours per week
<b>Holidays:</b>	27 days plus statutory bank holidays
<b>Pension:</b>	Contribution to Group Personal Pension Plan or NHS Pension Scheme (if already in scheme).
<b>Life Assurance:</b>	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.