



Job Description

Job Title: CRM Support Analyst

Reports to: Individual Giving Manager

Close liaison with: Fundraising Managers and wider team

Role Purpose

1. To manage the CRM database (Raiser's Edge), ensuring the performance, integrity and security is at its best
2. To maintain and help develop Raiser's Edge in order to meet long term fundraising goals
3. To support Managers in utilising data to help deliver their income targets and provide high levels of customer care to their donors and supporters
4. To provide the relevant information from Raiser's Edge to support accurate and effective targeting of our fundraising communications and appeals
5. To provide a high-quality service to Raiser's Edge users across Fundraising team, providing training and support where appropriate

Key Responsibilities

System Management

- Responsible for the day to day running of Raiser's Edge
- To work with Fundraising Managers to develop and maintain Raiser's Edge, including process improvements
- Ensure exceptional record-keeping for all supporters, donors and prospects across the department
- Manage relationships with third party providers and to administer the download and import of data from third party websites (i.e. JustGiving)
- Manage regular data cleaning exercises as appropriate
- Liaise with IT and fundraising on resolving database problems
- Manage the Gift Aid procedures and processes, ensuring good practise is adhered to
- Ensure staff have a good working knowledge of Raiser's Edge and identify any additional training needs

Data Insight

- Work with the fundraising and finance team to ensure systems, processes, records and financial data are synchronised
- Work with relevant members of the fundraising team to identify, implement and maintain supporter segmentations on the database
- Help create data segmentation and hierarchy for mass communications to supporters
- Manage data profiling exercises as required.
- To ensure all measurements within the department (KPI's etc) are up to date and accurate for Fundraising managers to report on.

Compliance

- Ensure compliance in line with data protection and fundraising regulation
- Be conversant and have a good working knowledge of GDPR, regulations from the Information Commissioners office (ICO), Fundraising Regulator and Fundraising Preference Service
- Maintain and record information on data protection and fundraising regulations, ensuring all concerns and questions regarding these (both internally and externally) are answered in a timely manner or escalated accordingly
- Ensure that the fundraising team is fully compliant with regulations on data handling and that all work with external contractors (e.g. for the provision of data for large-scale mailings) meets internal and external compliance regulations
- Liaise regularly with colleagues in the fundraising and finance teams to ensure accurate recording and reconciliation of the fundraising accounts and allocation of donations, including monthly imports of gifts onto Raiser's Edge where appropriate

Reporting

- Develop and maintain reports for use by the fundraising team
- Oversee and maintain the integrity of all data inputted onto Raiser's Edge
- Make recommendations to team on best practice and process within the charity sector

Other:

- To promote and deliver the highest standards of care, and support to donors, colleagues and others
- To undertake other duties as may be required and which are consistent with the nature of the role

Person Specification

Essential:

- A good working knowledge of Raiser's Edge and of delivering effectively within a CRM focused role
- An ability to work well in cross-departmental teams with technical and non-technical colleagues
- Proven ability to work methodically, to manage priorities and set and maintain standards
- Strong project management and organisational skills
- Excellent communication skills with experience of supporting colleagues in their learning and development
- Experience of communicating across a complex organisation and with a wide range of people
- Good knowledge of GDPR and data protection legislation

Personal characteristics should include:

- A passion for our work and a shared commitment to our values Excellent people skills, with a consultative approach to solving problems
- A self-starter with energy, who motivates with enthusiasm
- Planning and organising – sets priorities, schedules activities effectively
- Sets high performance standards for oneself
- Reliable, professional manner; flexible and calm under pressure

We reserve the right to update and amend this job description to ensure it accurately reflects the role. This will be agreed in consultation with the job holder.

September 2019