



**Post:** Data and Operations Officer  
**Department:** Development and Membership  
**Division:** Development

### Job Description

#### Key Responsibilities

- Manage all team processes and systems to ensure the smooth running of all development operations – managing and analysing data, processing gifts, dealing with general enquiries, leading on ‘operations projects’, working alongside Finance and assist colleagues with financial, data and process support.
- Overall responsibility for the inputting and updating of all supporter information and associated donations onto our CRM – NXT/Raiser’s Edge, ensuring accuracy and integrity of all records, including correct coding of income.
- Lead on the preparation and delivery of insightful monthly, quarterly, annual finance reports to provide budget holders and fundraisers with an accurate measure of past and anticipated future fundraising performance.
- Working with our Data Protection Officer and Prospect Research Officer to be responsible for the team’s data protection and fundraising regulatory compliance. Working with staff and volunteers to ensure that requirements are met or exceeded and that an appropriate archiving system is implemented and keep up to date with new developments in fundraising regulation and make any necessary changes to policy and practice.
- Enable effective segmentation of the database and provide accurate supporter mailing data for campaigns/appeals and events to maximise mailings’ return on investment while ensuring that mailing preferences of recipients are adhered to.
- Develop systems to improve the efficiency of data entry/imports and management within the database, identifying and implementing improvements to working practices to drive efficiencies and improve supporter experience.

#### Work Plan

- Develop and maintain a good understanding of RBGE fundraising and membership activities and build relationships with staff to actively support their work.
- Manage our account with our CRM provider (Blackbaud) to ensure that we receive appropriate products, training, and support. Liaise with BB regarding contract, status issues, new content.
- General ‘house-keeping’ of the database – duplicate management, tidying records where needed, importing of information
- Identify training needs and design and deliver appropriate training on NXT to existing staff, new staff and volunteers as required.
- Responsible for team’s financial reporting needs – monthly, quarterly, annually, as well as ad hoc
- Reconciling income on a quarterly basis, including preparing GS claims for RBGE and Botanic Foundation.
- Assisting with gift entry (specifically creating pledges) on an ad hoc basis
- Records management, including annual data cleanse and creating new procedures to fall in line with GDPR requirements and the RBGE Records Management plan
- GDPR responsibility, including LIAs and possibly extending use of RE7/NXT to other departments – marketing database is close to coming on board and initial talks are underway with Marketing and Communications, Education and People and Organisational Development (POD) (POD – volunteer module focus)



- Assisting Director of Development and Head of Major Gifts with budget needs – including comparing RE income against targets
- Data segmentation for appeals purposes
- Updating operational manual when necessary
- Assisting with donor stewardship across the organisation to maximise retention, mainly in relation to income received from the Botanic Foundation and PPL – confirming income received, as well as preparing comms to other departments about income allocation (specifically PPL)
- Proactively use NXT as a valuable analytical tool, looking for ways to use the database to enhance fundraising and membership communications, as well as identifying and seeking to remedy any problems with the database which limit fundraising or membership success/efficiency, or which negatively impact supporter experience.
- Develop and maintain strong, professional, and positive relationships with supporters, donors, volunteers, and colleagues.

### Person Specification

Skills/Aptitude	Essential	Desirable
Significant previous operations and database experience supporting fundraising, the methodologies, and tactics to ensure success	*	
Resourceful and proactive – enjoys working with data and can approach new systems with ease	*	
Proactive self-starter able to work under minimal supervision with a hardworking approach	*	
Ability to plan, prioritise and manage multiple projects simultaneously from start to finish, meeting demanding timescales and dealing with conflicting priorities	*	
Highly organised and solution focused with great attention to detail	*	
Assured and confident communicator with the ability to summarise complex information with clarity, brevity, and speed	*	
Ability to maintain high levels of confidentiality and integrity at all times	*	
Flexible, with a willingness to work non-traditional hours and be available to help with various development and fundraising events as required	*	



<b>Knowledge</b>	<b>Essential</b>	<b>Desirable</b>
Sound financial insight and good knowledge of UK charitable giving, data protection and taxation law as applies to fundraising, and the Fundraising Codes of Practice	*	
Highly proficient user of Microsoft Office products and CRM systems, preferably Raiser's Edge	*	
Experience of administering charity Gift Aid scheme	*	
An active interest in and understanding of RBGE, and a passionate belief in its mission	*	
Experience of data analysis		*

  

<b>Professional Qualifications</b>	<b>Essential</b>	<b>Desirable</b>
A relevant degree, professional qualification, or equivalent professional experience		*