



JOB DESCRIPTION & PERSON SPECIFICATION

POST: Data Management Officer

LOCATION: Hybrid (Perth/Aberdeen) / Home-based

REPORTS TO: Data and Insights Manager

LINE MANAGEMENT: None

ROLE PURPOSE

The Data Management Officer is responsible for managing and maintaining Scotland's Charity Air Ambulance's Customer Relationship Management (CRM) system and supporter data to enable high-quality fundraising, marketing, and supporter engagement activity, in line with the charity's Data & Insights Strategy. The role ensures data integrity, compliance with data protection requirements, and provides data selections, reporting, and technical support to colleagues across the charity.

KEY RESPONSIBILITIES

CRM & Data Management:

- Manage, maintain and support in the development of the CRM system to ensure it remains efficient, secure and fit for purpose, enabling effective fundraising, support management and reporting.
- Manage data coding and workflows related to the CRM system to maintain data integrity, consistency, accuracy and accessibility, as well as streamlining processes and supporting efficient operations.
- Provide first line support to charity staff and liaise with software providers, IT and third parties to resolve issues quickly and maintain system performance, upgrades and reliability.
- Maintain data quality through regular cleaning, archiving, data imports, mapping, integrations and audit controls, to ensure accurate, consistent and trusted data across the charity.

- Manage and maintain fundraising and lottery data import processes as required, to ensure all income is accurately recorded, up to date and available for effective reporting, reconciliation and supporter management.
- Develop and maintain procedures, process documentation and data records to support compliance, standardisation and effective data governance.
- Lead on and deliver database training for staff to ensure its effective use and promote capability and best practice in data management, acting as the first point of contact for data queries.

Data Processing, Reporting & Compliance

- Produce data selections, queries and reports to support fundraising campaigns, marketing activity and informed decision-making, ensuring timely delivery and prioritisation.
- Produce and develop reports / dashboards to provide business intelligence insights and allow tracking of performance against budgets, KPIs and strategic objectives.
- Monitor and analyse campaign, donor and donation data, supporting the Data & Insights Manager with identifying opportunities around supporter acquisition, donor journeys and retention strategies, where appropriate.
- Manage data integrity and compliance across supporter records, including mailing preferences, GDPR processing, data subject requests and Gift Aid claims, to ensure legal compliance.
- Supporting the Finance team with financial reconciliation processes, ensuring accurate and timely completion, when required.
- Develop and improve data processes to increase efficiency and support teams across the charity, in line with departmental objectives.

Insights, Planning & Collaboration

- Work collaboratively with the Data & Insights Manager, Individual Giving Manager and Marketing & Communications Manager on audience segmentation, campaign design, testing and evaluation, to maximise campaign effectiveness and supporter engagement.
- Work closely with the Finance team to align financial systems and the CRM to ensure robust data management and reporting.
- Develop, maintain and audit relevant charity data records and logs to ensure accuracy, accountability and compliance.
- Build and maintain effective working relationships with other CRM users, particularly the Administration and Fundraising teams, providing guidance,

troubleshooting, support and training to ensure accurate data capture, support efficient donation processing and promote consistent use of the CRM system.

- Support the Data and Insights Manager on data and insights related project work, as required.

GENERAL RESPONSIBILITIES

- Maintain and improve competencies through continuous professional development.
- Work collaboratively with staff across SCAA and with external stakeholders.
- Work effectively and efficiently on areas of administration, communication, health and safety and people protocols and policies to ensure that organisational systems and procedures are implemented.
- Abide by organisational policies, codes of conduct and practice as described in the Staff Handbook.
- Always operate in a professional way, dealing with issues in the most appropriate way, in keeping with your role as a key member of the Management team of a nationally recognised Scottish charity.
- Treat with confidentiality any personal, private or sensitive information about individual organisations and or schemes or staff etc.
- Carry out other associated duties as may arise, develop or be assigned in line with the broad remit of the post.
- Be prepared to travel throughout Scotland, and occasionally beyond to meet the needs of the business.

Any additional duties will normally be to cover unforeseen circumstances or changes in work and will usually be compatible with the regular type of work. If an additional task or responsibility becomes a regular or frequent part of the job, it will be included in the job description in consultation with the post holder.

AREA	ESSENTIAL	DESIRABLE
Experience & Knowledge	• Proven experience managing CRM systems in a charity or fundraising context and being comfortable working with large datasets. • Experience with data segmentation, ETL processes, transformation and import / export processes. • Strong understanding of data protection legislation (e.g. GDPR). • Understanding of Gift Aid regulations and charity	• Current or past experience using Donorflex. • Experience with charity fundraising platforms and digital integration (e.g. GivePanel, Enthuse). • Experience contributing to the design and implementation of multi-channel fundraising campaigns. • Experience using data visualisation tools, e.g. Power BI.

	fundraising compliance.	• Experience of delivering CRM user training. • Knowledge of supporter journeys and donor lifecycle management. • Knowledge of management account processes / financial reconciliation and how these align with CRM datasets.
Skills & Competencies	• Confident using query tools and an understanding of query-based data extraction. • Strong IT skills with competency using the MS Office suite and Excel in particular. • Strong interpersonal skills with the ability to work collaboratively across teams and support non-technical colleagues. • Ability to analyse and translate data into clear findings for campaigns and reporting, including donor value analysis.	
Other	• Calm and pragmatic approach, with the ability to manage multiple competing priorities and deadlines. • Highly organised and process-driven with excellent attention to detail. • Methodical and structured approach to problem solving, with the ability to identify and lead on resolving data / system issues. • Curious and enthusiastic about data, systems and process improvement. • Commitment to process documentation. • Ability to work independently whilst contributing effectively as part of a team. • Commitment to the mission, values, and ethics of the charity sector.	