



Somerset
Wildlife Trust



Wilder Somerset

2030



More space for nature where wildlife thrives
with more people on nature's side



Job description:
Fundraising Data Specialist

Somerset Wildlife Trust is a local independent charity and the only organisation uniquely focused on improving the natural environment of Somerset for the benefit of wildlife and people. We champion Somerset's stunning, diverse, and important natural environment, making the case for nature to the public and politicians. We protect wildlife and lead the recovery of the environment by example, including on our nature reserves.

Somerset Wildlife Trust is one of 46 Wildlife Trusts across Britain which together with the *Royal Society of Wildlife Trusts* collectively form *The Wildlife Trusts*. We are the biggest charity movement in the UK working solely for nature and we believe that restoring nature on a landscape scale is essential for tackling climate change and biodiversity loss.

The climate and ecological crises require comprehensive, ambitious solutions and urgent action across all sections of society. The crises are also inexorably linked so it is vital that our new strategy, '[Wilder Somerset 2030](#)' is delivered with both at its core. We recognise that people are part of the solution and everyone has a role to play in restoring nature and averting the worst of the climate change. Research suggests that if 1 in 4 people in society take action then social tipping points can be achieved and widespread positive change can happen. This underpins one of our key strategic goals and Team Wilder is our delivery approach to inspiring and empowering others to help nature recover.

Our New Vision

To deliver a Somerset wide nature recovery network creating more space for wildlife, benefiting everyone, and playing its part in helping us reverse biodiversity loss and tackle the climate crisis.

Our New Mission

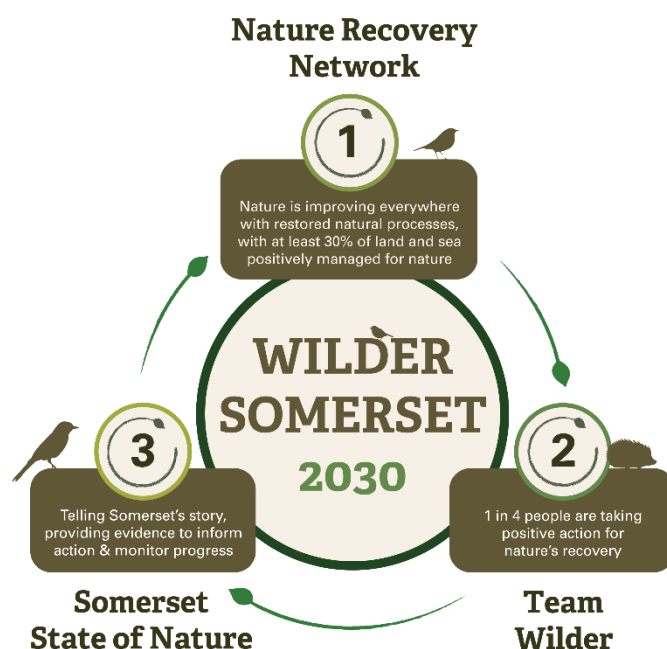
To champion the change needed to rebalance our relationship with wildlife and the natural world.

Our Goals for 2030:

To ensure that nature is improving across the county, supported by restored natural processes, and is connected and protected through a Nature Recovery Network, with at least 30% of land and sea managed positively for nature.

For nature to be valued and protected by everyone, building a movement with at least 1 in 4 people taking action for nature's recovery across Somerset.

By 2030 to tell the story of nature's recovery in Somerset through a shared, live online State of Nature tool that monitors progress and informs action.



About the post

Job Title	Fundraising Data Specialist
Grade	Band 3
Reports To	Fundraising Development Manager
Team	Fundraising
Responsible for	N/A
Job Purpose	To manage the Trust's supporter database and ancillary systems. Undertake data analysis to provide insights to inform trust wide decision-making, particularly for fundraising, engagement and supporter development.
Position	Full-time - hybrid office and remote working with expectation of spending 1-2 days a week in the Taunton office.
Working Relationships	Internal: All internal staff
	External: Somerset Wildlife Trust members and supporters, CRM-related suppliers and contacts from other Trusts
Benefits of working for Somerset Wildlife Trust	<p>We offer some fantastic benefits including:</p> <ul style="list-style-type: none"> • 7% employer pension contribution • Life assurance • An annual professional institution subscription if applicable • Flexible and agile working • Wellbeing support – EAP, wellbeing champions • Diversity networks through RSWT/TWT • Paid volunteer days • Continuous Professional Development opportunities • 33 days of holiday (25 + bank holidays) • Staff social calendar and events <p>The opportunity to make a real and positive difference to nature, communities and the climate</p>

Job Description – Key Responsibilities and Tasks

Responsibility 1: Database Management

- Act as Database superuser (Raiser's Edge), demonstrating an expert level of knowledge and providing technical support, training and advice to all areas of the organisation.
- Ensure a high standard of data input and adherence to processes and procedures, including compliance with GDPR legislation, Direct Debit rules and HMRC guidance.
- Oversee the effectiveness of the CRM
- Identify and suggest Database improvements that will support the organisation in maximising its potential.
- Support the addition of new data onto the CRM from other departments – share principles on best practice to ensure all data remains clean.
- Manage the ongoing roll out of CRM automated journeys, including e-communications and cost saving initiatives.
- Work with consultants and external organisations to continue active development of the CRM including the project management of current and future systems integrations, and the cost analysis against business needs.

Responsibility 2: Analysis and Reporting

- Extract and manipulate data to undertake insightful analysis to segment and identify key trends and behaviours to enable ongoing organisational development, including membership, appeals and engagement. Prepare clear written reports as needed.
- Create dashboards and reports to help team better understand and make decisions relating to their work. E.g. Using Power BI to process data and create dashboards.

Responsibility 3: Financial Processing

- Co-ordinate the processing of accurate monthly Gift Aid and Direct Debit claims according to an agreed timetable. Ensure all Direct Debit and HMRC rules are complied with.
- Liaise with Finance to assist with the reconciliation of financial data and troubleshoot any issues arising.
- Support the Fundraising team with Gift Aid best practice, including managing the integrity of current Gift Aid records and auditing past records

General

- The job holder is required to follow and comply with all policies and procedures of the Trust which includes the Trust's Health and Safety procedures in the workplace, ensuring personal safety and the safeguarding of the interests and safety of all staff, trainees, visitors, and others at the Trust.
- To uphold the working values and expectations of the Somerset Wildlife Trust.
- To carry out other duties relevant to your post as reasonably required by your line manager including where necessary to support the Supporter Care Co-ordinator and Supporter Care Administrator to ensure the smooth running of the team.
- To work collaboratively with other Wildlife Trusts to share learning and achieve greater impact collectively.
- Somerset Wildlife Trust is committed to creating a more digital culture across the organisation. We aim to become more collaborative, agile and efficient through the use of digital technology. A basic level of digital skills is expected of all staff with the opportunity to improve these skills with career progression.
- Somerset Wildlife Trust has an Equality, Diversity and Inclusion Plan and is committed to continuing to improve the equality, diversity and inclusion of every aspect of our work; we know we need to engage with everyone to live our Values and achieve our goals. We welcome applications from everyone and are happy to discuss any accommodations or arrangements that would make the recruitment process better for you, and the working environment should you be employed.

PERSON SPECIFICATION		
To succeed in this role you will need to demonstrate:		
	<i>Essentials</i>	<i>Desirables</i>
Qualifications	Degree or equivalent work experience.	
Experience/Knowledge	<p>In-depth knowledge and experience of using CRM/relational databases (ideally Raiser's Edge), with ability to guide and train users, set up dashboards and reports, implement improvements and conduct User Acceptance Testing.</p> <p>Experience of delivering and presenting data analysis, insights and reports.</p> <p>Knowledge and understanding of GDPR and other data protection legislation and how this applies to data management.</p>	<p>Experience of submitting Direct Debit and Gift Aid claims</p> <p>Experience of membership databases, contact and payment histories</p> <p>Experience of using PowerBI or similar reporting tools.</p>
Skills	<p>Advanced user of Excel: eg pivot tables and use of Vlookup function and graphs</p> <p>Strong analytical and problem-solving skills, and the ability to analyse data and processes in order to find ways to improve.</p> <p>Excellent time management skills with the ability to prioritise own workload, deal with conflicting demands and work under pressure to meet tight deadlines.</p> <p>Excellent numeracy skills and attention to detail.</p> <p>Strong interpersonal skills, with the ability to work effectively as part of a team and proactively build positive working relationships.</p> <p>Ability to maintain confidentiality of important and sensitive information.</p> <p>Ability to create clear, concise and accurate reports based on sound data analysis</p>	
Attributes	<p>High level of self-motivation and initiative, driven to achieve results.</p> <p>Ability to work independently and make decisions about systems development</p> <p>Process driven with ability to plan work and meet monthly and ad hoc deadlines.</p> <p>A team-minded approach - taking others on the journey with you and sharing knowledge /</p>	Committed to the aims of the Wildlife Trust movement

	<p>expertise for the benefit of the wider fundraising and marketing team and organisation.</p> <p>Demonstrable commitment to continuous learning and improvement.</p> <p>Motivated by raising funds to support nature's recovery in Somerset.</p> <p>Celebrates success.</p> <p>Resilient in the face of setbacks and challenges.</p>	
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Somerset
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SOMERSET WILDLIFE TRUST'S WORKING VALUES AND EXPECTATIONS

Developing Somerset Wildlife Trust

To deliver our Wilder Somerset 2030 plan we, Somerset Wildlife Trust, will need to build our charity, be clear in our priorities and ensure our own actions support our aims. We have a new set of Values that will inform all our decision-making and actions to bring about nature's recovery across Somerset.

- We are passionate about nature.
- We believe everyone can contribute to nature's recovery.
- We love Somerset - its amazing wildlife and its communities.
- We are confident and brave in standing up for nature.
- We encourage innovative thinking and action for nature's recovery.

To deliver our strategy we will:

- Support, inspire and enable others to act while leading by example.
- Develop a Climate and Environment Strategy that delivers on our own environmental commitments within the Trust covering all areas of our operation and land use including procurement, utilities, facilities, and transport to achieve carbon neutrality by 2030.
- Use our resources efficiently and effectively, harnessing the diversity, talent and commitment of our staff and supporters.
- Expand our supporter base and sources of income, including through embracing new opportunities to generate income streams that are compatible with our strategic goals and maintain financial stability.
- Embrace new ways to grow our impact and reach, with a particular focus on expanding our digital knowledge and experience.

