Job Description

George Watson's College

Job Title:	Development Officer (Database and Research)
Department:	Development Office
Business Unit:	Admissions, Communications and Development
Line Manager:	Head of Development

Job Purpose:

The role holder has three key areas of responsibility:

The management, analysis, interrogation, maintenance and enrichment of the data held on the School's stakeholder database (Raiser's Edge). The role holder will have advanced database skills including: building data imports and exports; an understanding of table and field structures; and an ability to build strategic business reports.

Utilising their research and data interrogations skills, the role holder will undertake proactive research to identify new sources of funding and support the Principal, Director and Head of Development to develop and grow their prospect pools.

Through effective management of the database, the role holder underpins the delivery of the *No Limits* Fundraising Campaign where they will additionally support the development and management of an annual programme of direct mail, telephone and digital fundraising, which focuses on increasing regular giving in support of the School's bursary programmes.

Main Responsibilities:

1	Database (CRM) Management The role holder is responsible for all functions relating to the School's stakeholder CRM (Raiser's Edge/RENXT)(c.33,000 records). This includes system development, data management protocols, staff training and legislative compliance. Tasks will include: ● Set the CRM system standards and take responsibility for the system architecture, including how fields and tables are used to store data. Developing system protocols and user manuals to ensure adherence to these ● Devise a data cleansing programme, sourcing relevant suppliers and ensuring 'data sharing' agreements are in place, in accordance with School IT policies ● The role holder is the key point of contact with the system supplier (Blackbaud), ensuring that upgrades are run and that issues/ errors are resolved quickly and efficiently for self and colleagues ● Responsible for ensuring the management, storage and use of personal	60%

	data is GDPR and data protection compliant, whilst maintaining the highest standards of confidentiality ● Responsible for complex imports and exports of data sets for mailings, events, benchmarking (IDPE and CASE) and other activities. This includes working directly with mailing houses to ensure data is properly transferred to questionnaires, mail carrier sheets, etc ● Work with IT on the systems that allow for the accurate import of new records and updates from the pupil record system; and HR on the processes for capturing and updating current and former staff data ● Manipulate financial data to produce reports for the Director, Head of Development and Volunteer Boards that track income against targets ● Work directly with mailing houses to ensure data is properly transferred to letters, mail carrier sheets and donation forms.	
2	Research and Data Analytics ● Using the database alongside a variety of external resources; develop a programme of research that identifies key stakeholders capable of providing financial support to fundraising priorities ● Utilise the School's historic records and archives to capture information about former staff and pupils ● Prepare briefing notes for the Principal, Governors and colleagues ahead of events and individual prospect meetings ● Responsible for generating communication lists for events and fundraising ● Utilise data mining techniques and other insights to devise seating plans and align relevant hosts to guests ● Identify Watsonians of interest for potential stories in publications.	20%
3	Fundraising and Financial Responsibility ● Develop and maintain the Prospect Module to ensure that it supports colleagues with the tracking and management of their prospect lists through the different solicitation stages. Ensure that relevant data is being captured to allow for useful monitoring and reporting ● To develop, implement and manage, with the support of the Director and Head, the School's regular giving programmes through a range of innovative and targeted mailed, telephone and digital campaigns ● Work closely with colleagues to ensure that appropriate donor stewardship and recognition processes are in place. Reviewing and updating these as necessary. This will include inputting into the planning and delivery of the School's annual programme of donor cultivation and stewardship events ● To support the team with the creation of the annual donor report, with a particular focus on data analytics.	15%
3	Other Support the work of the Development Office by undertaking other duties as specified by the Line Manager.	5%

Key Contacts and Working Relationships:
● Build and maintain effective relationships with a wide range of internal and external individuals and stakeholder groups, including: current staff and Watsonians (former pupils and staff, and current parents) to support the delivery of department and School strategies. ● First point of contact for enquiries relating to the regular giving programmes. ● Builds networks with external suppliers, eg mailing houses, print suppliers.

- Provides support and advice to colleagues, the Principal and other volunteers supporting the fundraising programmes, based on their research and data analysis.
- Supports the team with the delivery of the School's programme of events and meets a wide range of stakeholders. This requires evening and weekend working.
- Active member of the Blackbaud User Group and attend other relevant sector meetings and conferences to keep up to date with new developments, legislations and best practice.

Planning and Organising:

- Responsible for managing and prioritising own areas of work, ensuring that competing projects are delivered on time.
- Through 1:1s ensure the line manager has a clear understanding of achievements against objectives.
- Responsible for managing a successful regular giving programme, ensuring key messages and stories are targeted to the right audience and distributed in a regular and timely manner.
- Manages data exports for a busy schedule of events, mailings, etc. Working with colleagues on communication deadlines and liaising with mailing houses and print companies to ensure data is supplied in time to meet distribution deadlines.

Problem Solving and Decision Making:

- Resolve complex and routine problems from a range of individuals, using their own knowledge and expertise to find solutions. In particular this will relate to database systems where there have been issues with compliance related to charity legislation, GDPR and data protection, caused by processing or data manipulation errors.
- Sets overall standards and protocols for managing mailed, telephone and digital fundraising tactics, ensuring compliance across the team and school, as appropriate; and ensuring compliance with relevant legislation.
- Manage complaints from individuals relating to GDPR and use of personal data held of the Development Office stakeholder database; in some circumstances, where this has been escalated by colleagues. Reporting these to the Bursar where there may be a need to report breaches to the ICO.
- Responsible for writing operational documentation and protocols, related to data capture, management and use, that others follow and adhere to.
- Responsible for the management of the CRM system RENXT, which includes using own knowledge and expertise to decide on the most appropriate table and field structures required to support fundraising and stakeholder engagement. This will include writing guides and protocols for the use and storage of data and training staff to ensure understanding and compliance.

Resources and Requirements:

- Responsible for planning and delivering an annual giving programme, which will require a budget to cover print, postage and salary costs. The role holder will outline their budget requirements and once approved will be expected to deliver activity within agreed parameters.
- The role holder will require the support from others in the team, as well as temporary staff to help deliver the telephone fundraising campaigns.

Knowledge, Skills and Experience:

Essential:
- Must be an advanced user of Raiser's Edge or similar Stakeholder database system
- Previous experience working in a fundraising or membership team, which should include

an understanding of prospect management and pipelines, research and donor stewardship
- Research experience, utilising online and other resources to help segment and target different stakeholder groups
- Understanding of data protection, GDPR, PECR and Scottish Charity legislation
- Excellent interpersonal and communication skills (verbal and written)
- Good planning and organisation skills
- Good team working skills – collaborative in approach
- Must work responsively and flexibly to meet the demands of the role
- Sound decision and judgement making ability
- High levels of attention to detail and accuracy
- Diplomatic, discreet and demonstrates high integrity
- A willingness to become involved with the Watsonian community outside normal working hours.

Desirable:
- Experience of supporting the delivery of a range of fundraising programmes, including mailed and phone campaigns
- Understanding of charitable giving, including gift aid
- Previous web editing/ use of content management systems
- Experience of managing social media channels in a business/ work context