

Job Description & Person Specification

Position: Data & Insights Executive

Reports To: Head of Data & Insights

Levelling Framework: Level 6B

Contract: Permanent

Hours Per week: 35

Works closely with: Head of Data & Insights, Head of Donor Engagement, Head of Events & Sponsorship, Donor Engagement team, Events & Sponsorship team, Finance colleagues, Marketing colleagues, and service colleagues

Our Values and Behaviours

To act in accordance with “Our Values and Behaviours” at all times when delivering your role, ensuring that “Kindness”, “Respect”, “Belonging”, and “Empowerment” are fundamental to your behaviour.



Policies and Procedures

In addition to undertaking the accountabilities as outlined below, the post holder will be expected to fully adhere to all Norwood policies and procedures which are referenced in the employment contract and Norwood's intranet.

Role Summary

The Data & Insights Executive plays a critical role in supporting Norwood's relationship-led fundraising strategy by ensuring accurate data, reliable income processing, and strong supporter administration across the fundraising department.

The postholder manages day-to-day donor data, income recording, and administrative workflows that underpin effective fundraising. By maintaining high standards of data quality and supporter care, the role enables frontline fundraisers to focus on relationship-building and income generation.

Working closely with the Head of Data & Insights, Finance and fundraising colleagues, the role supports reporting, pledge tracking and CRM processes that ensure income and donor commitments are recorded accurately and followed up through agreed processes.

Key Accountabilities

Specific objectives, KPIs and priorities will be agreed through annual planning, line management and performance review processes, in line with the fundraising strategy and organisational priorities.

Donor Data Management & Quality

- Maintain accurate, timely, and consistent donor records within the CRM.
- Ensure all donations, pledges, and supporter interactions are correctly recorded.
- Carry out regular data checks and cleansing to maintain data integrity.
- Support consistent data standards and disciplined CRM use across the fundraising team.

Income Processing & Administration

- Process fundraising income accurately and efficiently, including donations received via post, online platforms, events, and third-party channels.
- Ensure income is coded correctly and reconciled in line with internal controls and finance processes.
- Support the tracking and administration of pledges, regular gifts, and one-off donations.
- Work closely with Finance colleagues to support reconciliation, reporting, and audit requirements.

Pledge Tracking & Fundraising Support

- Support the preparation of pledge reports and updates for the Head of Data & Insights, Donor Engagement team, and Finance.
- Provide accurate information to fundraisers to support timely relationship-led follow-up of pledges.
- Monitor outstanding pledges and flag risks or delays where appropriate.

Donor Administration & Acknowledgements

- Support timely and accurate donor acknowledgements and thank-you processes in line with agreed procedures.
- Respond to routine donor administration enquiries professionally and efficiently, escalating relationship or stewardship matters to the relevant fundraiser where appropriate.
- Support high standards of supporter administration across relevant touchpoints.
- Monitor donor administration workflows and flag backlogs or risks to the Head of Data & Insights.

Reporting & Insight Support

- Produce regular reports and data extracts to support fundraising activity, event follow-up, and stewardship.
- Support the Head of Data & Insights in preparing regular income reports, dashboards and analysis.
- Provide accurate data extracts and reports to support fundraising performance monitoring and decision-making.
- Ensure fundraisers and managers have access to reliable information to support their work.

Systems & Process Improvement

- Support the continuous improvement of fundraising systems and administrative processes.
- Identify inefficiencies or risks in data handling and propose practical solutions.
- Assist with system testing, upgrades, and the introduction of new fundraising tools where required.

Compliance & Governance

- Ensure all data handling complies with GDPR, data protection regulations, and fundraising best practice.
- Support the management of donor preferences, suppressions, and consent records.
- Follow internal policies relating to data security, confidentiality, and fundraising compliance.

Professional Development, Networking & Team Contribution

- Actively represent Norwood externally through networking events, community activities, sector forums and stakeholder engagement, where relevant to the role.
- Develop professional, sector and community knowledge through peer learning, collaboration with colleagues and other charities, service engagement, and continuous development of fundraising best practice.
- Attend and support relevant Norwood fundraising events and activities where required and proportionate to the role, using these opportunities to strengthen relationships with donors, funders, supporters and stakeholders.
- Work flexibly around key events and activities outside standard hours, with time off in lieu provided in line with organisational policy.
- Contribute positively to team planning, shared objectives and a collaborative “one team” culture across fundraising.
- Ensure all fundraising activity complies with the Code of Fundraising Practice, GDPR and Norwood policies.
- Maintain high standards of donor care, professionalism and confidentiality.
- Act as an ambassador for Norwood and its services.

Person Specification

	Essential	Desirable	Evidence
Qualification(s)	GCSE Maths and English (or equivalent) or evidence of ongoing professional development.	Educated to degree level or able to demonstrate equivalent experience gained in previous roles.	Cover Letter / CV / Onboarding
Experience	Experience working with databases, CRM systems, or administrative systems. Strong attention to detail and high standards of accuracy. Experience handling financial or transactional data. Confidence managing competing priorities and deadlines.	Experience working in a fundraising, charity, or not-for-profit environment. Experience using fundraising databases such as Raiser’s Edge. Experience supporting income processing or donor care functions.	CV / Interview / Onboarding
Personal Qualities & Attributes	Highly organised and methodical. Strong numeracy and data handling skills.	-	Cover Letter / CV / Interview

	Clear communicator, able to explain information simply. Calm, reliable, and solutions-focused. Comfortable working as part of a team supporting multiple stakeholders. Professional and discreet. Trustworthy and dependable. Committed to high standards of supporter care. Motivated by accuracy, efficiency, and impact. Strong alignment with Norwood's mission and values.		
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All roles require a DBS check and satisfactory clearance under Norwood's safer recruitment policies. We are committed to safeguarding the wellbeing of our people and maintaining a respectful, safe environment.

This job description is not exhaustive and may be updated as accountabilities evolve.

