

JOB DESCRIPTION



Job Title	Data and Research Officer
Team	Fundraising Team
Location	Homebased
Reports to	Head of Fundraising
Salary	£27,100 gross per annum plus pension and benefits
Duration	Permanent
Normal Working Hours	36 hours net per week

The Churches Conservation Trust (CCT) is the national charity caring for historic churches at risk. As the operator of the third largest heritage estate in charitable ownership in the UK, our 356 historic churches include examples of irreplaceable architecture, archaeology, and art from 1,000 years of English history.

CCT has an international award-winning reputation in heritage conservation and regeneration. All churches in our care are listed, mostly Grade I and II*, and some are Scheduled Ancient Monuments.

Without our care, these buildings might have disappeared entirely. Instead, they are enjoyed as social, tourism, educational, and cultural resources, kept open, in use, and living once again in the heart of their communities.

Overall job purpose

To support the implementation of a proactive and successful major gift fundraising strategy, CCT needs to ensure an active and regular flow of major gift prospects in the pipeline, from which to cultivate a pool of individual relationships and solicit major gifts in a 1:1 setting.

The overall purpose of the Data and Research Officer is to provide a high standard of prospect research, philanthropic pipeline development, and administrative support to the wider Fundraising team. This is particularly important as CCT is migrating to a new CRM system, which will require as a minimum the extensive cleansing and importing of supporter data and setting up customized income and appeal-based reports.

Key relationships

Aside from members of the Fundraising team, the Data and Research Officer will work alongside the Finance, Regional and Communication teams, Information Governance Manager, and GDPR Officer, so that the whole staff and community support network of CCT are empowered to drive forward fundraising.

This reflects an organisational-wide aim to build a collaborative fundraising culture and ensure CCT's buildings at risk are sustained for the appreciation and benefit of future generations.

Key duties and responsibilities

Specific tasks include the following:

- Produce a pool of prospective donors with the affinity, propensity, and capacity to give at a major gift level.
- Produce detailed corporate and major donor research profiles and capacity ratings, for key prospects in the UK and overseas, including comprehensive background information from publicly available sources, handling information in accordance with the Data Protection Act, the CCT's policies for use of personal data, and within the parameters of the UK General Data Protection Regulation
- Undertake strategic network mapping to enable engagement with current and future fundraising prospects.
- Provide insight and recommendations to make informed data-driven and timely decisions progressing prospects through the donor journey.
- Conduct research on trusts, foundations, and grant funders in support of CCT's top 15 priority conservation projects, and other projects, including those initiated by different friend groups, that require funding.
- Provide due-diligence research reports on individuals, companies, grant funders, trusts, and foundations where required.
- Assist the Head of Fundraising in the creation of ethical fundraising and donation acceptance policies

Grants and Trust Fund Processing

- Assist the Fundraising Manager (Grants and Campaigns) to undertake financial reconciliation including management of pledges and uploading of grant bank deposits
- Manage the pipeline of submitted grant/trust applications via the CRM, and report on funds received.
- Maintain accurate records of grant and trust funders on the CRM, updating key relationships where required.

Other

- Promote the Fundraising team services to colleagues throughout CCT providing guidance, training, and reports where required.
- Feed into discussions on CRM database migration work stream to ensure the new CRM accurately reflects team database requirements
- Act as a data champion within the wider organisation to ensure all data is collected, used, and stored on the CRM in line with UK GDPR.
- Assist the Senior Fundraising Officer and Fundraising Officer with the processing of donations and payments for events, ensuring these are acknowledged promptly.
- Provide administrative support to the Fundraising team to cover events planning and delivery, financial reconciliation, including the management of grant/legacy payments, and the updating of legator details on the CRM, including correspondence with the solicitors, and Wills, so as to ensure legal compliance.

Key criteria for success

After 6 months in post, the successful candidate will have:

- Worked alongside the Fundraising Manager, Grants, and Capital Campaigns to undertake research on trusts, foundations, and grant funders in support of CCT's top 15 priority

conservation projects, and other projects, including those initiated by different friend groups, that require funding.

- Provided research profiles on CCT's existing major donors.
- Be proficient in the use of the CRM system as related to the processing of memberships, donations, and contact information, and be confident in providing guidance and occasional one-on-one training in the effective use of the CRM to other members of staff.
- Undertaken a data audit and cleanse of ThankQ in readiness for the migration of supporter data to a new CRM system.
- Established good working relationships with the Communications, Regional, and Finance teams.

N.B. This job description is not all-encompassing. Over time the emphasis of the job may change without changing the general character of the job. Your duties may be reviewed from time to time and revised and updated in consultation with you to reflect appropriate changes.

Mandatory training (for all roles)

If successful, you will be required to complete mandatory compliance training including but not limited to:

- Equality, Diversity, and Inclusion
- Bullying and Harassment for Employees
- Stress Awareness
- Mental Health Awareness
- Health & Safety Essentials
- Fire Awareness
- DSE Assessment
- GDPR UK Awareness
- Safeguarding Awareness
- Effective Remote Working (if applicable)

Safeguarding

We believe that everyone we come into contact with has the right to be protected from all forms of harm. We want everyone visiting our churches, volunteering with us, or working with us to have a safe and enjoyable experience. We will not tolerate abuse, maltreatment, or exploitation by or to our staff

Person Specification: Data and Research Officer

1. Top Essential Criteria

If you cannot provide evidence that you fully meet these criteria, your application will not be put forward for further shortlisting against the other criteria in sections 2 & 3.

	Essential Criteria	How this will be assessed
1	Excellent research skills with the ability to gather and analyse data from a wide range of sources and present the information in a clear, and succinct manner.	A/I
2	Possess traits of good judgment, confidentiality, and discretion in relation to prospect data.	I

3	A clear understanding of the principles of fundraising and donor motivations and use this to inform your research practices.	A/I/P
4	Experience in inputting, and interpreting data in CRM systems	A/I
5	Knowledge of the Data Protection Act and the UK General Data Protection Regulation	A/I

2. Further Essential Criteria

	Essential Criteria	How this will be assessed
1	Strong ability to set priorities and manage workflow to fulfill objectives and meet goals according to deadlines in a high-paced work environment.	I
2	Ability to create and maintain positive working relationships with CCT staff and external stakeholders.	I
3	A creative flair that can be harnessed into practical, improvements to fundraising processes.	I/P

3. Desirable Criteria

	Desirable Criteria	How this will be assessed
1	Educated to degree level	A
2	Knowledge/experience of fundraising in heritage or an arts-related field	A

Information on assessment methods

Code	Assessment method	This means...
A	Application	You need to provide examples and evidence as to how you meet these criteria in your application.
I	Interview	You will be asked competency-based questions around this criteria at the interview.
T	Test	This could be an ability test or group exercise assessing you against the criteria.
P	Presentation	You will be asked to prepare or give a presentation to demonstrate against these criteria.

Selection criteria

The candidates who appear from their application to best meet the person specification criteria will be invited to interview. It is therefore essential that your application gives a full but concise description of the nature, extent, and level of the responsibilities you have held. The shortlisting criteria are detailed under the personal specification. Please ensure that you address each of the areas that are to be assessed in your application. Applications by CV only will not be accepted.

We are an inclusive employer and offer equal opportunities to all regardless of an individual's age, disability, gender identity, marriage or civil partnership status, pregnancy or maternity, race, religion or belief, sex and sexual orientation.

We are not a licenced sponsor at this time. Any offer of employment will be made subject to valid right to work in the UK being provided.

Employee benefits

- Membership of the generous Civil Service Pension scheme with matched contributions of 27.1%
- 27.5 days annual leave provision
- flexible working arrangements
- home working allowance for home-based staff
- life assurance through the Civil Service Pension scheme
- learning and development opportunities
- enhanced parental leave arrangements
- a free and confidential employee assistance programme
- season ticket loans and cycle to work scheme

- reward of performance and an annual salary review
- subscription allowance to a professional body
- 20% staff discount on Champing at CCT sites

Applications

If you would like to apply for this role, please visit our website. You will be directed to our online recruitment system. You'll be asked to submit a CV and a short supporting statement (max 2 sides A4) outlining how you fulfil the person specification for this post.

Please note direct applications via email cannot be accepted for this role; only applications submitted through our recruitment portal will be considered.

The closing date for receipt of applications is **9am on Monday 27th February 2023**.

Interviews will be held on **Wednesday 8th March 2023** via **Teams** Please note that the interview dates have been specifically chosen according to the availability of the panel.

We are a Disability Confident Committed Employer. Candidates who declare that they have a disability and who meet the essential criteria for the job will be offered an interview.

If you have a disability and wish to request a reasonable adjustment at any stage of the recruitment process, please email recruitment@theccct.org.uk.

The Churches Conservation Trust is committed to a policy of equal opportunities.