



JOB DESCRIPTION

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| Role: | CRM & Finance Executive |
| Department: | Development/Finance (shared) |
| Reports to: | Finance Manager |
| Works closely with: | Development Executive |
| Hours: | Full Time |
| Location: | Hybrid working between the DSWF Shalford Office (GU4 8JU) two days per week (Tues and Thurs), and home, with occasional travel and attendance at events. |
| Annual Leave: | 25 days per annum plus Bank Holidays. At DSWF's discretion, the office usually closes between Christmas and New Year (additional to annual leave) |

Summary of the role

The CRM/Finance Executive plays a vital operational role at DSWF, acting as the organisational expert on the charity's CRM (Beacon) and supporting the Finance Manager with income recording and other finance tasks. The postholder ensures that all supporter data in the CRM is accurate, compliant, and aligned with financial records (in Sage 50), enabling effective fundraising delivery, robust reporting and sound financial management.

Working primarily across the Development (Fundraising) and Finance teams, the CRM & Finance Executive will manage day-to-day data integrity and reporting, whilst supporting the Finance Manager in income recording and other finance tasks. The role underpins donor stewardship, income forecasting, Gift Aid claims and regulatory compliance, ensuring that data and payments are recorded correctly and consistently across systems.

This is a detail-focused, problem-solving role, suited to someone who enjoys working behind the scenes to ensure systems, processes, and information flow smoothly and reliably.

Key responsibilities

CRM & Data Management

- Act as DSWF's internal expert on the CRM system, ensuring confident and consistent use across all teams.
- Maintain accurate, complete, and up-to-date supporter, donor and art buyer records.
- Ensure data integrity through regular data cleansing, validation and quality control.
- Develop and maintain clear data processes, documentation and guidance for users.
- Support staff training on CRM usage and best practice, including use of dashboards.

Income Processing & Financial Alignment

- Support the Finance Manager to ensure that all income is accurately recorded and aligned within the CRM and finance systems.
- Support accurate tracking of income by fund, by campaign and by source.
- Ensure Gift Aid is processed correctly, with appropriate evidence and compliance.

Reporting & Insight

- Produce regular and ad-hoc reports from the CRM to support fundraising performance, forecasting, and decision-making.
- Provide accurate data selections and exports from the CRM for appeals, events, and supporter communications.
- Support the Development team with pipeline reporting, income tracking and KPI monitoring.
- Assist with Trustee, SMT and statutory reporting as required.

Compliance & Governance

- Ensure all data handling complies with GDPR, Fundraising Regulator guidance and internal policies.
- Support audit processes by providing clear, accurate data and documentation.
- Maintain secure data access controls and permissions.

Systems & Process Improvement

- Act as a key contact for CRM development, upgrades or integrations.
- Support the Digital Marketing Executive with imports and exports between the CRM, website, email platforms and third-party fundraising systems.
- Identify opportunities to improve data efficiency, accuracy and reporting capability.
- Troubleshoot data issues and work proactively to resolve system challenges.
- Lead on ad-hoc checks to ensure all staff are using the CRM system correctly and where necessary implement further training, guidance and support

PERSON SPECIFICATION

This role would suit someone with relevant experience, but we also welcome applications from entry level candidates at the start of their career as training will be provided.

Essential

- Excellent attention to detail and commitment to data accuracy.
- Demonstrable aptitude for maths (min. maths GCSE B/Grade 6 or above)
- Experience producing reports and managing complex data sets.
- Strong organisational skills and ability to manage competing priorities.
- Collaborative approach, with confidence working across Development and Finance teams.
- Enjoyment of problem-solving within data and technology setting.

Desirable

- Experience working with CRM systems, ideally within a charity or fundraising environment.
- Level of confidence working with financial data.
- Experience working with charity finance or management accounting systems.
- Experience supporting Gift Aid processing and compliance.
- Good understanding of GDPR and data protection principles for charities.
- Experience supporting fundraising teams or income generation activity.
- Interest in conservation, wildlife and DSWF’s mission.

As with all roles at the Foundation, this position carries a shared responsibility for fundraising and income generation, ensuring work actively contributes to the sustainability of DSWF’s conservation, education and art programmes.

Please note that as part of a small team, the role may include occasional additional duties to help meet the charity’s wider needs.

This job description is a statement of the job content agreed in May 2026. It should not be seen as precluding future changes.

Job Holders Signature.....