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JOB DESCRIPTION

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| **Job Title:** | CRM Co-ordinator |
| **Team:** | Central Support Team |
| **Location:** | Cathedral Offices |
| **Line Manager:** | Head of Marketing & Communications |
| **Matrix reporting line:** | Communar/COO |
| **Contract type:** | Fixed Term for 12 months |
| **Hours:** | 14 hours per week 0.4FTE |
| **Date of completion:** | April 2023 |

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| **1** | **Job Purpose** |
|  | Chichester Cathedral is made up of four separate legal entities: The Chapter of Chichester Cathedral (an ecclesiastical charity), the Chichester Cathedral Restoration and Development Trust (a charitable incorporated organisation), the Chichester Cathedral Friends (a charitable incorporated membership organisation) and Chichester Cathedral Enterprises Limited (a commercial company).  Under data protection law we are joint controllers of personal data, which is used for a number of shared purposes: communication, fundraising and promotion, to name but a few.  In 2020 the entities embarked on a new project introducing a shared CRM database to ensure greater oversight and protection of personal data. The nominated product is Charity CRM (formerly ThankQ) and is provided by the Access Group.  Three years on the entities are now seeking an individual to oversee the co-ordination of projects, and general maintenance, of the CRM and its key interfaces. This is a new role rooted in collaboration with team members across all Cathedral entities, as well as with dedicated project manager/s at Access. |
| **2** | **Principal Accountabilities** |
| **a**  b  c | Process   * Undertake day-to-day maintenance, development and support of the Cathedral’s database to ensure it performs to optimal level and in line with users’ expectations; * Provide a clear developmental plan for the CRM database, comprising major projects. Work collaboratively with colleagues and external suppliers to define and implement these projects, test workflows and troubleshoot technical problems and issues ensuring that they are accurately documented and understood; * Work with the Head of Communications to develop a major mailings plan, to ensure data subjects are contacted reasonably and in-line with data law and organisational practice; * Continue to improve the quality of the data within the CRM dataset; * Encourage best practice and data compliance; * Import data from various file types, including spreadsheets and text files, ensuring its’s cleaned and quality checked as part of process.   People   * Supporting stakeholders with reporting, growing an understanding of data subjects, donors and members. This includes recording a supporter’s engagement with any part of the Cathedral family, via events, donations and membership; * Monitor and troubleshoot data and systems-related problems that may arise such as financial transactions, event registration, membership applications due to data or issues in third party integrations; * Lead on the on-boarding of new team members, developing a clear and consistent training programme. * Support team members in the querying, analysis and presentation of supporter data across the organisation.   Examples of major projects in the twelve months:   * Leading on a mass-mailing to data subjects, calling for them to update their personal data and preferences; * Joining quarterly meetings with the designated account manager at Access; * Creating an on-boarding programme for new members of the CRM, including designated access rights. |
| **3** | **Level of Responsibility** |
| **a** | **People**  No direct line reports, however, the individual will work in collaboration with colleagues to fulfil the objectives of the role. |
| **b** | **Financial Management**  Ability to understand, process and present financial information and understand financial implications as part of report drafting or summarising. This includes regular reviews of costs involved in the CRM contract. |
| **c** | **Compliance**  A responsibility to ensure the CRM is being used in-line with data protection law and best practice – and in-line with the data sharing framework set out my the Cathedral entities. |
| **4** | **Contacts** |
|  | * To work closely with entities across the Cathedral entities, including staff and volunteers; * To work externally with the team at Access, project manager and customer success managers – as well as third parties, including print houses and distribution centres. |
| **5** | **Special Requirements** |
|  | * This is a hybrid role where there is flexibility to split your working week between home and the office; * Mandatory GDPR and safeguarding training will be provided. |
| **6** | **Qualifications, Skills and Experience** |
|  | **Essential**   * Extensive experience of using Microsoft programmes; * In depth knowledge of Microsoft Excel to ‘clean’ large data sets and analyse data; * experience of working with a CRM database in a ‘Superuser’ capacity; * evidence of building and managing relationships with a range of stakeholders; * good communication (verbal and written) skills; * strong organisation and time management skills; * understanding of data compliance and best practice under the UK GDPR.   **Desirable**   * experience of using content management systems, such as Umbraco; * experience of working with queries, relationships or Power Query within Excel; * experience of using third party ticketing systems, such as TicketSource; * experience of working for charities and non-profits; * experience of using third party donation platforms, such as CAF donation; * experience of using digital mailing systems, such as Mailchimp or DotMailer; * understanding of processes of claiming GiftAid with HMRC. |