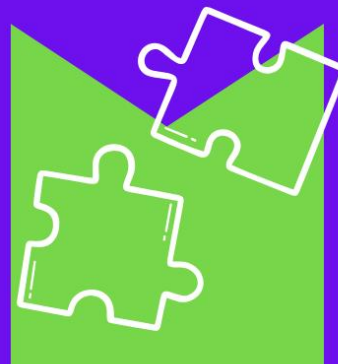




CRM Officer

Fixed term for 12 months

Full-time

London



Thank you for your interest in joining the team at the **Mental Health Foundation**.

This is a fantastic opportunity to join an organisation with an urgent and vital mission. We work to prevent mental health problems and support people to live with good mental health.

Mental health is one of the most important foundations for a long and healthy life. But we need real change at a national, community and individual level to tackle inequalities and help people support and protect their mental health.

For 75 years, we have been pushing forward the frontiers in our understanding of mental health. Interest has never been greater, and we are ambitious and committed to making the biggest difference we can, motivated by our conviction that everyone deserves good mental health. We bring together research, lived experience, public information and advocacy towards the strategic objectives that guide our work.

We are a people powered charity that has the financial resources to achieve a step change in our reach and impact. And we are building an organisation that lives its values and has a strong and diverse team that is dynamic, energetic and committed to working together.

There is much more to do, and we are looking for an exceptional CRM Officer to enable the Mental Health Foundation to be the most effective it can be.

In this document we present information about the Foundation and about this vital role.

If you are up for the challenge, I hope you will get in touch.

Kind regards



Mark Rowland, CEO





WHO WE ARE

Everyone deserves good mental health

Mental Health Foundation is the UK charity focused on preventing poor mental health and building and protecting good mental health.

We're the home of Mental Health Awareness Week.

Mental health is one of the most important foundations for a healthy and long life, and we believe everyone deserves good mental health.

No-one living in the UK should be deprived of the opportunity for good mental health because of who they are, the community they come from or where they live.

Poor mental health is not inevitable. There are things we can do as individuals, in our communities and across society to help us all to live with good mental health.

Our values

- Side by Side
- Walking our Talk
- Determined Pioneers
- Making a Difference

We're challenging the way things are done and creating fundamental change in the UK's approach to mental health by:

- Researching and developing new and more effective ways to support good mental health
- Providing everyone with evidence-backed advice and resources they can trust
- Running national campaigns and working with communities to nurture good mental health
- Working with organisations across the UK and influencing decision-makers at all levels, to take the valuable lessons we've learned and adopt solutions that are proven to work.

We work across the four nations of the UK with offices in Belfast, Cardiff, Glasgow and London.

Together, we can help everyone have better mental health. Join us.



ABOUT THE ROLE

Place of work:	Hybrid working remotely and at the London offices: 197 Long Lane, London, SE1 4PD
Grade:	Grade E, Scale points 1 to 4
Salary:	Starting at £32,604 rising to £36,796, plus London weighting of £4,000
Contract type:	Fixed term for 12 months
Hours:	Full time, 32 hours per week
Department:	Marketing & Content
Reports to:	CRM Manager
Responsible for:	n/a
Budget responsibility:	n/a

Job purpose

Working alongside another CRM Officer, this role will support the CRM Manager with data processes, in particular data import and export to/from Beacon CRM fundraising database, as we look to integration and automate more of our systems and processes. High-quality data will enable us to develop stronger relationships with our supporters to retention and maximise lifetime value working in an agile way.



JOB DESCRIPTION

Database Management

- To assist with the development and review of administrative processes that involve the database across the Fundraising department, helping ensure a high level of supporter care through excellent data management.
- Work with and provide absence support for the Supporter Services Officer in their day-to-day database administration including processing daily gifts, coding them accurately, exporting to Beacon and thanking as appropriate.
- Manage in accordance with agreed protocols and in agreement with CRM Manager data processes, imports and exports of all fundraising data including direct debits, new donors, email sign-ups etc.
- Undertake database housekeeping procedures in accordance with agreed protocols and in agreement with CRM Manager such as cleaning and compacting the database, identifying and merging duplicate records, removing or archiving redundant data and similar tasks to ensure the efficient operation of the system and accuracy and reportability of all records held.
- Ensure that the use of the Fundraising database and the capture of all data from supporters or prospects conforms to data protection guidelines including GDPR in particular where relate to supporter preferences and contents.
- Supporting colleagues who are using the database across the organisation to comply, in agreement with CRM Manager.
- Champion accurate data capture of supporter communication preferences and supporter insight on Beacon.
- Support training for the colleagues using Beacon and help ensure all members are trained and kept up to date on new features and enhancements as they require to do their job effectively.
- Identify and refer fundraising database issues to CRM Manager.

Database Reporting

- Produce reports and queries for standard monthly payment and collection reports as requested by the Finance Department, external agencies and the Head of Public and High Value Fundraising, that can then be utilised ongoing by colleagues in Fundraising to help manage their areas of responsibility.
- Produce ad hoc reports as requested to support business decisions and fundraising campaigns.
- Support the reconciliation of the bank statement with Beacon and provide details to Finance to enable accurate coding for management accounts.

- Ensure that all documentation, processes and database functionality relating to Gift Aid declarations are adhered to as directed by the CRM Manager.
- Ensure that the Fundraising database is up-to-date including adding all campaign, appeal and fund codes on an annual basis as directed by the CRM Manager.
- Supply the relevant information needed for reporting and financial reconciliations, by ensuring that all donations are correctly attributed to the database contact records using correct and appropriate codes.
- Maintain data and reporting integrity and accuracy to support the Fundraising Team in reaching and surpassing income and donor development targets.

Relationships

- This role will work closely with other colleagues across the organisation, including, Finance, Fundraising Communications, and Programmes teams.
- Maintain excellent supporter relationships by telephone, email and post.
- Oversee the work of specialist external suppliers such as those pertaining to the upkeep of the Fundraising database, telemarketing and fundraising agencies, printers and copywriters, ensuring projects run according to brief, budget and schedule.

Other duties

- The CRM Officer will undertake other duties consistent with the post and, where necessary, will assist with other areas of work as required by the Data Manager or members of the Senior Leadership Team.
- Contribute to the general running of the Fundraising team attending meetings as required, sharing knowledge and expertise.

General

- To promote and support the achievement of the Foundation's mission, goals and values.
- To act as a positive ambassador for the Foundation in all opportunities.
- To maintain a high standard of honesty and integrity in all aspects of the role maintaining good relationships with colleagues and external partners and to act in accordance with the Foundation's staff code of conduct.
- To uphold and promote the Foundation's commitment to equality, diversity and inclusion, and the value of lived experience.
- Share our commitment to safeguarding and promoting the wellbeing of our beneficiaries, staff, volunteers, and anyone else who comes into contact with our services.
- To engage in learning and development activities appropriate to the role.
- To have due regard to health and safety issues.
- To undertake any other duties as may reasonably be required.

This job description is not contractual and is liable to change over time.



PERSON SPECIFICATION

	Essential	Desirable
Knowledge and qualifications	• Demonstrable working knowledge of GDPR, Fundraising standards and Codes. • Relevant qualification or relevant experience.	• n/a
Skills and abilities	• Demonstrable problem-solving skills, working on own initiative to identify problems and apply solutions with a focus on service improvement. • Proven IT skills including Excel and Word to an advanced level. • Demonstrable successful communication, interpersonal/relationship building and negotiating skills. • Evidenced skills to write, edit and appraise supporter communications. • Evidenced attention to detail. • Evidenced experience of being target driven, focused and able to manage tight and conflicting deadlines. • Evidenced ability to work well in a team, with the ability to support and train colleagues and learn from them. • Evidenced ability to think analytically and deliver the most effective and accurate solutions for data capture, manipulation and reporting.	• n/a
Experience	• Demonstrable relevant experience working in Fundraising, or a Charity database team role using a CRM, with experience of Beacon or Raiser's Edge. • Evidenced experience of managing high volumes of personal data using a large and complex supporter/CRM database.	• Demonstrable experience of dealing with finance and figures in a work context, with good numerical, analytical and financial skills.

	• Demonstrable experience of importing, exporting and reporting from a relationship database. • Evidenced experience of troubleshooting and contributing to the management of administrative/process-based systems.	
MHF requirements	• A commitment to working in accordance with the Foundation's Essential Principles as laid out in the Foundation's Strategy. • Self-sufficient in use of information and communications technology. • Ability to self-manage a full and varied workload.	• n/a

Competencies for working at the Mental Health Foundation

We expect all employees to be able to use these competences to a high level in their roles.

During the recruitment process, at interview stage, we look for evidence of all these competencies:

- Expertise, knowledge and analysis
- Communication, influencing and promotion
- Relationships and partnership working
- Service focused
- Business aware
- Strategic thinking and decision making
- Leadership
- Adaptability and personal responsibility
- Innovative and creative
- Committed to personal development