



START SOMETHING

YOUR NEW ROLE AT THE TRUST

JOB TITLE:	Fundraising CRM Transformation Data Manager	PAY BAND:
FUNCTION:	Fundraising, Brand and Marketing	Support Delivering Specialist/Managerial Technical Lead/Function Head Senior Leadership Team
THE TEAM:	The Supporter Performance and Operations Team drive the performance of our fundraising efforts. We partner with colleagues to improve the quality and efficiency of our supporter facing activities	



WHERE YOU WILL FIT

CEO	Director of Fundraising	Deputy Director of Fundraising	Senior Head of Supporter Experience and Data Manager	Fundraising CRM Transformation Data Manager
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HOW DOES THIS ROLE IMPACT YOUNG PEOPLE?

Young people need us more than ever and we will be there for them. Every year, we need to raise around £50m. This role will play critical part in raising the money we need to help young people. This role will be responsible for developing and delivering the fundraising data ways of working, processes, and activities to help drive our fundraising performance.

WHAT WILL YOU DO?

-  Play an active role in the CRM Transformation Project Team to help ensure we build and implement a successful new Fundraising CRM on time and on budget.
-  Proactively work with stakeholders and the Business Change Manager to understand business needs and requirements to realise the benefits the new CRM will provide.
-  Work with the project team and implementation partner to prototype and build fundraising data processes, workflows, data fields and reporting to optimise fundraising operations.
-  Collaborate with the implementation partner on designing and delivering the data migration plan, ensuring accuracy, completeness and consistency of data are maintained.
-  Collaborate with the implementation partner, Technology team and external vendors to design and implement data integration solutions including the use of APIs and ETL processes.
-  Prepare the data set for data migration, including implementing the Data Retention schedule, decreasing duplications and correcting data categorisation inconsistencies.
-  Define and champion new frameworks for embedding and monitoring good data management practice, particularly around data quality and data completeness in the new CRM.
-  Provide technical support and guidance to fundraising staff regarding CRM usage, troubleshooting issues, and optimising workflows.
-  Work with the Business Change Manager to develop and deliver training programs for all CRM users.
-  Stay updated on emerging trends, best practices, and advancements in CRM technology and fundraising strategies and apply knowledge to enhance effectiveness of the CRM system.



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THE SKILLS YOU'LL BRING

All of the roles at The Trust are key to our success and there are certain skills we need to be successful. And while we will shortlist the most qualified people for the role, we ask everyone for a supporting statement. If you think you could do the role, but don't have all the desirable experience, we would still love to see an application from you.

WE REALLY NEED YOU TO HAVE THESE

Skills & Knowledge	Why do we need this?
Understanding of data modelling principles, with the ability to use data to influence business processes	To ensure that our fundraising data infrastructure and processes are efficient, compliant and of high quality
Excellent relationship management and communication skills, with the ability to translate complex data into meaningful insight for Fundraising colleagues	You will work collaboratively with colleagues across our fundraising teams to help them make the most out of their data
Excellent analytical and problem-solving skills, with the ability to translate business requirements into technical solutions	To be able to serve our colleagues complex fundraising data requests and find solutions
Understanding of Equality, Diversity & Inclusion principles and a commitment to apply them	To support the Prince's Trust commitment to represent the communities we serve
Experience	Why do we need this?
Experience of working with a fundraising database and data driven fundraising or sales role	To help colleagues get the most out of our fundraising data to help us raise as much money to help young people
Experience of managing multiple and significant projects, to deliver high quality results on time and on budget	To prioritise multiple project workstreams to ensure they are delivered to a high standard
Experience of developing data controls and processes with a strong control ethos and ways of working	To ensure that our fundraising data infrastructure and processes are efficient, compliant and of high quality

WE WOULD LOVE IT IF YOU COULD DO THIS

Experience	Why do we need this?
Experience of working on a Fundraising CRM Data Transformation Project, including the migration of a major data set	To bring insight, experience and knowledge as we embark on implementing a new CRM
Experience of working with Raiser's Edge 7 and Dynamics 365	To utilise your experience and knowledge to support the project team through the transformation project
Experience of operationally supporting a broad and diverse fundraising data portfolio	To support the development of a CRM which will serve multiple different data uses and requests across the fundraising team
Experience of using business reporting tools such as Tableau, Power BI, Metabase	To understand the business needs and CRM capabilities when it comes to reporting
Experience of championing the development of new innovative and agile approaches of working	To support the team to embrace opportunities presented by new technology
Skills & Knowledge	Why do we need this?
Strong understanding of data migration methodologies, ETL processes, and data integration tools	To support the successful migration of the data to the new CRM
Strong knowledge of working with coding language(s) for data analysis e.g., SQL, R, Python (SQL primarily used for this role)	To bring insight on how to manipulate data and build sustainable processes and reports that help us drive our fundraising performance
Strong working knowledge of Data Protection and GDPR principles, along with experience of implementing a data retention schedule	To ensure data quality maintained and compliance with GDPR requirements






WHAT DO WE EXPECT FROM YOU?



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OUR VALUES

Our values are at the heart of everything we do – they articulate who we are and how we work together to achieve our aims to help young people.

 <p>Inspiring We lead by example</p>	 <p>Approachable We are open minded and value diversity</p>	 <p>Empowering We enable positive change</p>	 <p>Non-Judgemental We focus on the potential, not the past</p>	 <p>Passionate We are absolutely committed to supporting young people</p>
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Here at The Prince's Trust, we're committed to equality, diversity and inclusion. We want to be an organisation that's representative of the communities we serve, which is why we strive for diversity of age, gender identity, sexual orientation, physical or mental ability, ethnicity and perspective. Our goal is to create an environment where everyone, from any background, can be themselves and do the best work of their lives.

We're a Stonewall Diversity Champion and we are Disability Confident employer. Our staff, volunteers and young people are supported by PT CAN (our Cultural Awareness Network), PT GEN (Gender Equality Network), PT DAWN (Disability & Wellbeing Network) and Pulse (LGBTQIA+ Network). For more information, [click here](#).

OUR BEHAVIOURS

We expect certain behaviours from you about how you interact with colleagues, our partners, young people & the public. As someone who works in at a specialist/managerial level, we would expect that you live these behaviours.

Leading by Example	Continuous Improvement	Effective Communication	One Team	Delivering Results
<p>You inspire others through passion for what we do You keep young people and our end goal in mind You build trust in others through reliability and holding self-accountable for success Resilient in the face of challenges, not taking constructive criticism personally You're authentic and bring unique talents to work, encouraging others to do the same You role model integrity and act according to our Values</p>	<p>You champion change initiatives and help others see the benefits and opportunities You take an entrepreneurial approach to improving how we do things You seek opportunities to enhance own development and build expertise You role model a positive and constructive approach to giving & receiving feedback You support others in adapting to change</p>	<p>You're approachable, clear and assertive You cascade important and relevant information to others clearly and swiftly You treat people as individuals, tailoring communication and influencing style accordingly You communicate difficult messages and challenge others' thinking effectively You listen to and empathise with others to understand the root of situations before responding</p>	<p>You role model effective and mutually supportive teamwork with colleagues You manage the expectations of others, gaining buy-in where required You share knowledge and information You build and invest in relationships across The Trust You use awareness of how your own team fits within the wider organisation to find solutions</p>	<p>You translate The Trust's long-term vision and strategy into actionable plans & targets You take responsibility for making and implementing logical, data-based decisions You're flexible and responsive as priorities and requirements change You seek solutions and solve problems, empowering others to do the same</p>

THE WELFARE OF OUR YOUNG PEOPLE

The Prince's Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. As part of this commitment we undertake basic disclosure checks in accordance with the Codes of Practice for all roles within the Trust, and for our roles working directly with young people, at an enhanced level. Having a criminal record will not automatically exclude applicants.