JOB DESCRIPTION – CRM DATABASE COORDINATOR

Job Details

Job Title – **CRM Database Coordinator**
Responsible to – **CRM Database Marketing Manager**
Job Family – **Administration and Data**

Location –**Glasgow or Edinburgh**
Salary – **CHAS Sector Band 4, points 8-10)**

Job Purpose

Working within the culture, ethos and philosophy of CHAS, this post will be responsible for harnessing the financial value in our database through the use of database driven marketing.

The post holder will support the promotion of all CHAS supporter activities and products by developing cost effective marketing across all channels and maximising value from existing and potential supporters.

This multi-disciplinary role will work as part of a small team providing specialist expertise in the day to day running of the CRM and the relevant processes and procedures which allow the smooth management of data and financial information.

Main Tasks

- Data Management
- Income Management
- Administration
- Support training of colleagues in new processes and applications
- Information Governance

Job Activities

Data Management
- Ensure there is a controlled environment for the effective management and use of data across all development teams
- Maintain data standards, ensuring that all data input is accurate, consistent, and timely and adheres to best practice
- Assist with prospect research and provide data that will enhance understanding of supporters

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- Assist the CRM Database Marketing Manager with data segmentation and audience profile development and testing strategies to optimise all supporter communications in line with the Fundraising Strategy
- Provide appropriate levels of database training across all Development teams and provide database induction for new staff,
- Develop skill and knowledge of the CRM and wider ecosystem to allow the knowledge transfer to colleagues within CHAS.
- Fulfil website updates in relation to the management of event, email marketing and donation pages from the content management system Online Express and verify data interfacing with Raiser's Edge
- Provide detailed advice and support to the Fundraising, Finance and Volunteering departments on all aspects of the donation data process and aspects within Raiser's Edge
- Manage and deliver data requests in line with fundraising activity, including mailings and campaigns, ensuring these are delivered to agreed timescales and specifications
- Develop new processes on best practice use of new technology to meet CHAS aims and objectives.

Income Management
- Assist the CRM Database Marketing Manager with database marketing strategies that maximise all supporter engagement campaigns, and encourage supporter recruitment, retention and loyalty
- Support fundraising in delivering appeals
- Work closely with the CRM Database Marketing Manager to fulfil data selection briefs and identify appropriate segments for targeted marketing activity
- Run analytical reports and queries as and when required, and preparation of reports for meetings of Trustees and Senior Managers
- Working with the Finance department, ensure data integrity and compliance on all aspects of income management and reporting
- Manage the development of supporter journey action tracking within Raiser's Edge across all income streams

Administration
- Assist with the maintenance of policies, procedures, standards and protocols for optimum use of the database
- Ensure that transactional and donor data is effectively captured, imported/exported, processed and reported using the most efficient means
- Assist the CRM Database Marketing Manager, and CHAS's IT and Information Management teams to identify and develop effective links to other databases and channels used in CHAS
- Identify and carry out essential database maintenance tasks and assist with the data cleaning process; including using own initiative to identify and correct data issues in the system.
- Provide support to department planning processes for new types of activities and payments
- Keep up to date with industry innovations, standards and best practice

Information Governance
- Ensure existing data collection procedures are implemented correctly
- Comply with the CHAS Information Governance Framework and associated policies such as GDPR to assist CHAS in complying with its legal duties
- Create and control user access permissions and security rights
- Assessing and updating current processes and procedures related to records and gift processing to implement time and cost-saving measures

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Health and Safety
- Responsible for complying with the CHAS Health and Safety Management Policy and associated procedures and co-operate with CHAS in complying with its legal duties
- Use of VDU equipment more or less continuously.
- Occasional need to carry and move equipment without aids
- Responsible for the proper and safe use of IT equipment

Volunteer Engagement
- Delegate work to a team of volunteers, ensuring appropriate support mechanisms are in place and that individual skills are utilised appropriately
- Actively manages, supports, trains and develops volunteers
- Conducts regular catch ups with volunteers to ensure they are happy and fulfilled in their volunteer role
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Dimensions

- Reports to CRM Database Marketing Manager
- Responsible for CRM users, effective use of the database
- In performing this role, frequently has contact with all the Development, Finance and volunteering teams, and works closely with the Supporter Care team
- Manage internal Database user groups and meetings as required.

Decisions and Communications

Decisions
- Required to work without direct supervision, although tasks are set, agreed and assessed by CRM Database Marketing Manager
- Within the agreed management structure of CHAS, takes decisions regarding database use
- Provide escalation point to colleagues to provide advice on how to resolve CRM issues
- Responsible for the day to day administration of the database in association with the CRM Database Marketing Manager
- Required to work independently to ensure ongoing objectives are met
- Works with a high degree of autonomy within the agreed management structure of CHAS,
- Participate in decisions on best course of action taken to solve complex issues

Communications
- Able to communicate information to Development and wider team using a range of methods but with particular skills in written and verbal communications
- Exceptional communication and presentation skills, with the ability to convey technical concepts to non-technical audiences.
- On a daily basis, communicates complex system information with the other members of CRM database team and staff and volunteers CHAS wide
- Excellent interpersonal skills, with the ability to build rapport and trust with stakeholders at all levels

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PERSON SPECIFICATION – CRM DATABASE COORDINATOR

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Education, Qualifications, and Training

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Essential
- Educated to HNC/D level or equivalent in relevant discipline

Desirable
- Degree qualified or equivalent

Method of Assessment – Application Form

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Skills, Abilities, and Knowledge

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Essential
- Demonstrable working knowledge of CRM Databases and Excel
- Demonstrable working knowledge of Microsoft Office software applications
- Working knowledge of data protection issues and policies (GDPR)
- Interpersonal skills including the capacity to work with colleagues across all sites
- Strong understanding of CHAS plan and vision
- Demonstrable commitment to continuous professional development
- Commitment to excellence and integrity in fundraising and communications
- Ability and commitment to implement CHAS policy with particular regard to fundraising in an ethical manner
- Highly developed inter-personal skills required, and sustain relationships at all levels
- This role requires prolonged periods of concentration when analysing data, developing solutions to problems or identifying. It can be subject to frequent interruption to deal with emerging issues or priority incidents.
- Physical skills are confined to prolonged periods of use of desktop computing equipment, which require advanced keyboard skills required inputting and manipulating data.
- Ability to problem solve

Desirable
- Working knowledge of Raiser's Edge
- Working knowledge of the voluntary sector in Scotland and the current regulatory framework

Method of Assessment – Application Form and Interview

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Experience

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Essential
- Demonstrable and significant experience in the coordination and administration of databases

- Significant experience of interpreting data analysis, segmentation and targeting
- Able to oversee data inputs
- Experienced in manipulating data

Desirable
- Experienced in delivering database training programmes
- Experienced in working with volunteers

Method of Assessment – Application Form and Interview

Personal Qualities

Essential
- Enthusiastic about data
- Acts with integrity
- Works co-operatively with colleagues to improve service
- Forms meaningful relationships with others
- Demonstrates initiative and acts with effectiveness
- Accountable for own actions and decisions
- Commitment to CHAS core value, vision and purpose
- Commitment to working with/supporting volunteers
- Professional attitude to work
- Views change as a natural, positive and a continuing process

Desirable
- None

Method of Assessment – Interview

Other Requirements

Essential
- Willingness to travel between CHAS sites

Desirable
- Access to a car and full driving license

Method of Assessment – Application Form and Interview

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