



**Bicton Heath, Shrewsbury, SY3 8HS**

**Re : Data and CRM Manager - Telford**

This application pack contains the following information regarding the above-mentioned post:

- 1. Job Description and Person Specification**
- 2. Information to Candidates**
- 3. Equal Opportunities Monitoring Form**

Having read the enclosed information, your completed application form should be returned to the **HR Department** at the address above, to arrive no later than **8am Monday 27<sup>th</sup> September**.

We will respond to all unsuccessful applications within 4 weeks of the closing date via email (if you have provided an e-mail address on your application form).

Thank you for the interest you have shown in this post.

Yours sincerely

**Gaynor Lewis**  
**HR Manager**

## **Severn Hospice**

### **Data and CRM Manager - Telford**

#### **INFORMATION TO CANDIDATES - SUMMARY OF MAIN TERMS AND CONDITIONS OF EMPLOYMENT**

The following information is intended as a useful guide to applicants considering joining the Hospice. Full details are supplied with an offer of appointment.

##### **1. MEDICAL**

As part of the Hospice's selection procedure for employment, we ask all prospective employees to complete a pre-employment medical questionnaire. The purpose is to fulfil our responsibilities under the Health and Safety at Work Act 1974 and to ensure that the proposed employment does not present any particular risks from a medical point of view.

No formal offer of appointment will be made until the Hospice, through its Occupational Health Service Provider, is satisfied about your medical fitness to undertake the job. Further details about this will be sent to any prospective employee following interview.

##### **2. REFERENCES**

No formal offer of employment will be made until we have received satisfactory references.

##### **3. DISCLOSURE**

Not applicable

##### **4. PROBATIONARY PERIOD**

Your appointment will initially be for a probationary period of 6 months during which time your progress will be regularly assessed. Your line manager will work closely with you in order to help and support you as necessary throughout your probationary period. The Hospice reserves the right to extend the probationary period for any reason should this be deemed necessary eg. to provide additional training.

Your appointment will be confirmed in writing following the satisfactory completion of your probationary period. Your employment may be terminated at any time during the probationary period with appropriate notice. However, prior to this decision being made, every effort will be made to ensure that you reach the required standards.

##### **5. SALARY**

The salary for this post is **£30,500 per annum** (pending review)

Salaries are paid monthly by credit transfer to a bank or building society account.

##### **6. HOURS OF WORK**

37 ½ hours per week including some evenings and weekends

##### **7. HOLIDAY**

Full time holiday entitlement is 262 ½ hours holiday per year (including public holidays).

##### **8. NOTICE**

During your probationary service the period of notice to terminate your employment is one week by either party.

## **Severn Hospice Equality and Diversity Statement**

**Severn Hospice (the Hospice) is committed to the equal treatment of all employees and job applicants and requires all staff, whatever their grade or authority, to abide by this general principle. The Hospice is committed to all employees being able to achieve their full potential in an environment characterised by dignity and mutual respect.**

No individual shall be treated less favourably than another on grounds of gender, age, religion or belief, marital status, race, nationality, ethnic or national origin, sexual orientation, disability, social background, trade union membership, criminal record, carer responsibilities or employment status. The policy of equality of opportunity extends to all services we provide.

Severn Hospice aims to promote equality of opportunity for all with the right mix of talent, skills and potential and welcome applications from a diverse range of candidates including those with criminal records. We comply fully with the DBS Code of Practice and undertake to treat all applicants fairly. We undertake not to discriminate unfairly against any subject of a DBS Check on the basis of a conviction or other information revealed. Candidates are selected for interview based on their skills, qualifications and experience.

A DBS Check is only requested after a thorough risk assessment has indicated that one is both proportionate and relevant to the position concerned. For those positions where a DBS Check is required, all application packs will contain a statement that a Check will be requested in the event of the individual being offered the post.

Details of criminal records must be sent under separate, confidential cover with your application form. We guarantee that this information will only be seen by those who need to see it as part of the recruitment process.

All those involved in the recruitment process have been suitably trained to identify and assess the relevance and circumstances of offences. At interview, an open and measured discussion will take place on the subject of any offences or other matter that might be relevant to the position.

Criminal records will be taken into account for recruitment purposes only when the conviction is relevant. Having an “unspent” conviction will not necessarily bar you from employment. This will depend on the nature of the position and the circumstances and background of your offences. However, any “unspent” convictions, which are not declared and subsequently revealed, may result in dismissal.

Under the Rehabilitation of Offenders Act 1974, a conviction will become “spent” (i.e. treated as if it had not occurred) where the individual has not, after a specified period of time, committed another serious offence.

Rehabilitation periods vary depending on the type and length of conviction originally incurred.

Severn Hospice has a legal obligation to protect vulnerable client groups from people who have committed serious offences, and as such meets the requirements in respect of exempted questions under the Rehabilitation of Offenders Act 1974. All applicants who are offered employment in a post that falls into this category will be subject to a Disclosure Barring Service Check, before the appointment is confirmed. This will include details of cautions, reprimands or final warnings, as well as convictions, including “spent” convictions and where the post is subject to an Enhanced Check, other relevant non-conviction information, such as police enquiries and pending prosecutions will be included.

Severn Hospice is committed to compliance with the Disclosure Barring Service’s Code of Practice for Registered Persons and other recipients of DBS information.

*A copy of the Hospice’s Equality and Diversity Policy is available upon request.*

## EQUALITY AND DIVERSITY MONITORING FORM

Severn Hospice wants to meet the aims and commitments set out in its Equality and Diversity Policy. To assist the Hospice in meeting this aim, we need to monitor the equality and diversity profile of the workforce. We also need to ensure that we fully comply with the Equality Act 2010. The Act sets out 9 'protected characteristics' – age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

This form is voluntary and will not be used as part of the selection process nor will it be seen by anybody who is interviewing you. The information collected is only used for monitoring purposes in an anonymised format to assist the organisation in analysing the profile and make up of individuals who apply, are shortlisted and appointed to each vacancy. Should you not wish to complete this form your application will not be prejudiced in any way.

**Please can you complete the form and mark the box with an 'x', where applicable. Please place in a sealed envelope separate to our application form.**

<b>First Name:</b>		<b>Surname:</b>	
<b>Date of Birth:</b>		<b>Position applied for:</b>	

Are you married or in a civil partnership?

<b>Yes</b>		<b>No</b>		<b>Prefer not to say</b>	
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### ETHNICITY

<b>White</b>	<b>British</b>	
	<b>Irish</b>	
	<b>Gypsy or Irish Traveller</b>	
	<b>Any other White background (please specify)</b>	
<b>Mixed/ Multiple Ethnic Groups</b>	<b>White and Black Caribbean</b>	
	<b>White and Black African</b>	
	<b>White and Asian</b>	
	<b>Any other Mixed/multiple ethnic background (please specify)</b>	
<b>Asian or Asian British</b>	<b>Indian</b>	
	<b>Pakistani</b>	
	<b>Bangladeshi</b>	
	<b>Chinese</b>	
	<b>Any other Asian background (please specify)</b>	
<b>Black/African/Caribbean/Black British</b>	<b>African</b>	
	<b>Caribbean</b>	
	<b>Any other Black background (please specify)</b>	
<b>Other Ethnic Groups</b>	<b>Arab</b>	
	<b>Japanese</b>	
	<b>Any other ethnic group (please specify)</b>	
<b>Prefer not to say</b>		

## AGE

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Under 16		35-39		55-59	
16-24		40-44		60-64	
25-29		45-49		65+	
30-34		50-54		Prefer not to	

## RELIGION AND BELIEF

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Buddhist		Jewish	
Christian		Sikh	
Hindu		No religion or belief	
Muslim		Prefer not to say	

## GENDER

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Male		Female		Transgender	
				Prefer not to say	

## SEXUAL ORIENTATION

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Heterosexual		Lesbian		Gay		Bisexual	
Prefer not to say							

## DISABILITY

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A disabled person is defined in the Equality Act 2010 as someone with a physical or mental impairment that has a substantial and long-term impact on their ability to carry out day to day activities. Examples are: mobility, manual dexterity, speech, hearing, seeing and memory.

The definition also covers HIV, Multiple Sclerosis and Cancer from the time of diagnosis, and progressive conditions from the point at which they have an impact on day to day activities.

The Hospice will consider making such adjustments as are reasonable in compliance with the Equality Act 2010.

Having read this do you consider yourself to be covered by the definition?

Physical Impairment	Yes		No		Prefer not to say	
Mental Impairment	Yes		No		Prefer not to say	

## DECLARATION

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The information you provide on this form will be used in anonymised form for the Hospice to internally record and monitor its progress against a number of indicators of workforce equality.

I agree to the use of my personal information as explained above



Signature:	Date:
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**DATA AND CRM MANAGER**  
**Job description and person specification**

Post title	Data and CRM Manager
Directorate	Income Generation
Salary	£30,500 (salary review pending)
Location	Primarily based at our Telford hospice with very occasional travel to our Shrewsbury hospice
Hours	Full time 37.5 hours per week
Role reports to	Associate Director - Fundraising
Management duties	Data Coordinator
Benefits of working with us	<p>Caring is at the heart of everything we do and that includes caring for those who work for us. Our benefits package includes:</p> <ul style="list-style-type: none"> <li>• Generous leave entitlement (27 days plus bank holidays for full time roles)</li> <li>• Contributory pension scheme</li> <li>• Subsidised meals and use of canteen</li> <li>• Well-being and staff support framework</li> <li>• Staff eligible for Blue Light scheme</li> <li>• Free car parking</li> </ul>

**Purpose of the post:**

Our Data and CRM Manager has a crucial and central function across the Income Generation directorate in managing our Customer Relationship Management (CRM) system, ThankQ. The role is responsible for the best use of the system and the quality of the data held on it.

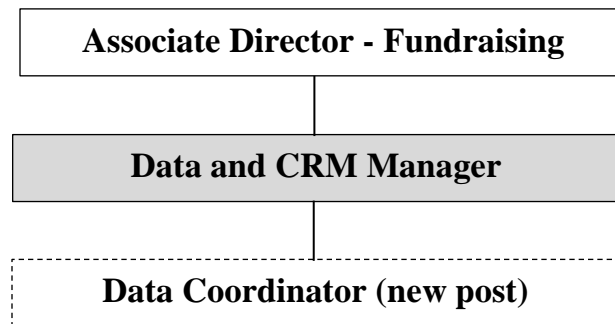
You will develop, manage, and optimise the use of ThankQ, whilst focusing on providing excellent customer care for our hospice supporters. An important part of the role is advising and guiding members of the Income Generation team to ensure ThankQ is the most useful fundraising tool Severn Hospice possesses.

We are looking for someone who is highly organised, with an eye for detail and a passion for

accuracy. You will be able to work proactively to identify system improvements, be solution-focused, a strong communicator, and be able to work well across multiple teams, often with differing needs and timescales.

The job requires a solid background in data and CRM management. Ideally you will be analytical with a good knowledge of data segmentation, profiling, and reporting.

**Position within the Income Generation team:**



**Principal duties and responsibilities:**

- System manager for the ThankQ CRM system and responsible for overseeing the effective use of the system for the whole organisation whilst collaborating with and being mindful of overlapping responsibilities in the Finance, IT and Information Governance teams.
- Oversee the growth and development of the database, advising on the implementation of database modules that will support our income generation activities.
- Working in close collaboration with the team, devise and implement a robust set of protocols for data entry onto ThankQ to ensure the integrity of the data is always maintained.
- Working with the Associate Director – Fundraising and key members of the team, play an integral role in the hospice’s supporter care service to donors by developing gold standard thanking and supporter journey programmes.
- In close collaboration with the team, design and implement supporter journeys across the entire department by analysing supporter behaviour, supporter propensity, and proximity to the cause to identify the most profitable and most relevant offers for supporters.
- Ensure all data is managed within the requirements of the Data Protection Act and GDPR, working in close collaboration with the Information Assurance and Security Manager. In respect of supporter data, ensure compliance with data protection

legislation, information governance policy, and ensure all staff/volunteers are always aware of these principles.

- Produce reports from the system, including activity reports and KPIs, and have responsibility for the development of any bespoke reports. Collaborate with the Information and Reporting Officer to establish the suitability of separate business intelligence tools to create bespoke reports.
- Working with the Associate Director – Fundraising and other key members of the team, manage the selection of data and scheduling of all outward supporter communications to prevent over intensity.
- Ensure appropriate data segmentations support the direct marketing needs of the department to maximise income and response rates, including leading on data aspects of all major mailings and telemarketing campaigns.
- Lead and manage the timely logging of all GDPR consent preferences and any notifications received via the Fundraising Preference Service.
- Manage the information requirements of CRM users and provide solutions for data recording within standard database functionality.
- Ensure the integrity of the data is always maintained. Ensure input standards and procedures for information and data quality are in place and managed effectively (including data retention rules) working in close collaboration with colleagues, especially the Information Assurance and Security Manager.
- Act as the lead contact for the CRM software provider, both internally and externally, for any ThankQ issues or requirements while working closely and effectively with colleagues in the Finance and IT departments to discuss related issues and future development needs as applicable.
- Manage in a timely manner all requests for help related to ThankQ, log and record them, resolve internally where possible and escalate to the ThankQ support team if required.
- Responsible for delivering training and supporting the development of all staff and volunteers in the use of ThankQ.
- Hold regular meetings with key stakeholders within the organisation to ensure excellent communication across teams, including IT and Finance, and chair the internal ThankQ Super User Group.



- Oversee the process for importing information into ThankQ from other systems, including the lottery database, patient database, and online event registration portal.
- Working closely with Income Generation and Finance colleagues, oversee appropriate coding structure to best support the monitoring of income performance and reporting.
- Manage the relationship with suppliers including ThankQ, JustGiving, and Virgin Money Giving.
- Ensure the license requirements of ThankQ meet the needs of the hospice and run regular usage reports to monitor CRM activity.
- Ensure all policies and procedures in relation to data processing are updated as necessary.
- Line manage the Data Coordinator, undertaking staff management responsibilities including regular one to ones, annual appraisals, staff development, and work performance.
- Undertake any other duties as directed by the Director of Income Generation and Associate Director – Fundraising.
- Post holder is the Information Asset Owner for the CRM System for information governance purposes and attend the Information Governance Fellowship or other applicable meetings is required.

This job description is intended as a guide to the range of duties covered and should not be regarded as inflexible. There is a mutual obligation to modify the description when changes in the work situation occur.

### **Supplementary information**

All new hospice employees are on a six-month probationary period.

In accordance with Severn Hospice's Health & Safety Policy all employed persons while at work are required by Section 7 of the Health & Safety at Work Act to take reasonable care of their own health and safety and that of others who may be affected by their acts or omissions.

All employees are required to participate in the hospice's appraisal process.

### **Person specification:**

The candidate must demonstrate, with examples and evidence, that they meet the criteria outlined below.

	Essential	Desirable
<b>Qualifications / Training</b>	<ul style="list-style-type: none"> <li>• Good level of education – minimum A Level standard or equivalent</li> <li>• Advanced IT skills on Microsoft packages, particularly Word, Excel and Outlook</li> </ul>	<ul style="list-style-type: none"> <li>• Degree in Data Science or Analytics</li> <li>• Evidence of continuing professional development</li> <li>• SQL training</li> </ul>
<b>Experience and Abilities</b>	<ul style="list-style-type: none"> <li>• Demonstrable experience of managing a CRM system and providing excellent customer service</li> <li>• Proven experience of data segmentation, creating reports, compiling mailing lists, carrying out data imports</li> <li>• Experience of training others and communicating specialist knowledge to all levels in an easy-to-understand way</li> <li>• Experience of implementing database modules and data entry protocols</li> <li>• Experience of working with and developing CRM systems to support marketing and communication functions, including data segmentation for direct marketing</li> <li>• Ability to work under pressure and prioritise constantly changing, high volume workloads to meet deadlines</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of working in the charity sector</li> <li>• Experience of working with ThankQ or another fundraising CRM</li> <li>• Experience of supporter care</li> <li>• Experience of dealing with JustGiving, Virgin Money Giving</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to make decisions, to work on own initiative, and accept responsibility</li> <li>• Ability to motivate and lead others</li> <li>• Ability to command the confidence of managers</li> <li>• Ability to think strategically and operationally</li> <li>• Ability to work alone and as part of a team</li> <li>• Ability to analyse complex facts and interpret data</li> </ul>	
<b>Skills &amp; Knowledge</b>	<ul style="list-style-type: none"> <li>• Highly knowledgeable of database marketing, the importance of data integrity and data protection</li> <li>• Excellent understanding of Data Protection Act and GDPR</li> <li>• Excellent communication skills, both written and verbal</li> <li>• Excellent organisational/time management skills</li> <li>• Strong interpersonal skills with the ability to communicate at all levels</li> <li>• Analytical with effective research and evaluation skills</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of Gift Aid</li> <li>• Understanding of the motivations of people giving financially to charities</li> </ul>
<b>Personal Qualities, Aptitudes and Attributes</b>	<ul style="list-style-type: none"> <li>• Practical, flexible, and calm under pressure</li> <li>• Tact and diplomacy</li> <li>• Good planning and project management skills</li> </ul>	<ul style="list-style-type: none"> <li>• Good sense of humour</li> </ul>

	<ul style="list-style-type: none"> <li>• Exceptional attention to detail</li> <li>• Understands and upholds confidentiality</li> <li>• Self-motivated and forward thinking</li> <li>• Empathy with the cause</li> <li>• Enthusiastic and passionate about the aims of the hospice</li> </ul>	
<b>Other requirements</b>	<ul style="list-style-type: none"> <li>• Willingness to occasionally work outside agreed hours</li> <li>• Willingness to train and learn new skills</li> </ul>	

*EW*  
*August 2021*