

Job Description

Job Title: CRM Data Project Lead – 12 Month FTC

Responsible to: Digital Fundraising Manager (CRM Project Lead)

Job Purpose:

The CRM Data Project Lead will provide dedicated delivery capacity to progress the data and CRM elements of Acorns CRM roadmap, ensuring that the data foundations, CRM configuration and processes required to support effective fundraising are delivered and embedded. Working across Fundraising, Data & Insight and Digital, the role will translate the CRM roadmap into deliverable activity, coordinate dependencies, and ensure that agreed changes are implemented effectively and sustainably.

The role will have a particular focus on CRM configuration, data quality, segmentation and supporter journey requirements, working closely with the CRM Project Manager, Data & Insight and relevant stakeholders. It will also work with external suppliers to ensure their outputs are translated into internal delivery and embedded within the organisation, while documenting processes and decisions to support sustainability beyond the 12-month fixed-term contract.

Main Duties:

CRM Configuration and Data Foundations

- > Support the audit and review of Gift Aid data and processes, working with relevant colleagues to identify gaps, risks and opportunities for improvement and establish a clear, compliant process.
- > Review data imports and exports, including understanding who is responsible for imports, identifying anomalies and strengthening controls around data entering the CRM.
- > Work with Data & Insight colleagues to identify recurring data quality issues and implement practical processes to prevent errors and improve consistency.
- > Ensure changes to CRM configuration and data processes are appropriately tested, documented and quality assured before being adopted.
- > Maintain a clear audit trail of key configuration decisions, data changes, processes and agreed standards.

CRM Roadmap Delivery

- > Take ownership of agreed Data & Insight milestones within the CRM roadmap and ensure activity progresses to agreed timescales.
- > Coordinate dependencies across Fundraising, Data & Insight, Digital, Finance, external suppliers and CRM stakeholders, ensuring actions and decisions are clearly understood and progressed.
- > Identify risks, blockers, resource requirements and decisions needed to maintain momentum, escalating these appropriately to the CRM Project Manager.
- > Work closely with Donorfy and other suppliers, to ensure supplier outputs are translated into practical internal delivery and embedded within Acorns.

- > Provide clear progress reporting against agreed CRM roadmap milestones and maintain accurate project documentation.
- > Support the transition of completed CRM project activity into sustainable BAU processes and ownership.

Segmentation and Supporter Journeys

- > Generate accurate supporter lists and segments from the CRM based on campaign specifications provided by fundraising teams and external agencies.
- > Work closely with Data & Insight and Digital to define the data requirements needed for targeted supporter communications and journeys.
- > Review and improve existing segmentation approaches and ensure agreed CRM structures support meaningful and consistent audience selection.
- > Create and maintain data selections, custom lists and other outputs required by fundraising and supporter experience activity.
- > Ensure data is accurate, consistent and usable across relevant systems and supports effective use of behavioural, transactional and engagement data.
- > Help establish the data foundations required to develop more targeted supporter journeys, communications and retention activity.

Reporting, Dashboards and Integrations

- > Support the development of dynamic reports and dashboards based on agreed stakeholder requirements, ensuring outputs are fit for purpose and sustainable.
- > Work with Data & Insight colleagues to establish and document stored procedures, custom lists and reporting processes aligned to agreed CRM structures.
- > Review current CRM integrations, including Dotdigital and other connected platforms, identifying dependencies, data flows and any changes required as part of the CRM roadmap.
- > Support the review of APIs and system interfaces with relevant technical colleagues and suppliers, ensuring changes to the CRM do not adversely affect connected platforms.
- > Identify opportunities to improve the flow and usability of data between the CRM and other fundraising and digital systems.

Stakeholder Engagement, Training and Change

- > Support stakeholder engagement through surveys, supporting information and drop-in sessions to understand current CRM usage, requirements and opportunities for improvement.
- > Work with identified CRM Champions to build confidence, encourage consistent use and support adoption of agreed processes and configuration.
- > Support the review of CRM users and permissions, ensuring access is appropriate to roles and responsibilities.
- > Develop and maintain clear guidance, process documentation and supporting materials to enable colleagues to use the CRM consistently.
- > Support training and knowledge transfer, including onboarding and training for new staff, so that changes introduced through the roadmap are embedded beyond the life of the project.
- > Communicate CRM changes clearly and positively, helping stakeholders understand what is changing, why it matters and what is required from them.



Data & Insight Capability and Resilience

- > Provide additional specialist capacity for the Data & Insight team during a period of transition and changing priorities.
- > Help establish more robust and sustainable ways of working for CRM management, data quality, reporting and selections.
- > Share knowledge and best practice with the Data & Insight team and build internal capability so that key processes can be maintained following completion of the project.
- > Provide additional capacity and resilience to respond to changing priorities, demand and unexpected requirements without compromising CRM delivery or BAU service.

Infection Prevention and Control

All Employees and Volunteers of Acorns will be expected to follow all infection prevention and control policies and procedures to ensure a safe and healthy environment. This includes maintaining best hygiene practices, using personal protective equipment (PPE) as required, and adhering to safety protocols to minimise the risk of infection. It everybody's responsibility to promote a clean and safe environment for staff, children, young people and their families.

Health and Safety

All Employees and Volunteers of Acorns are required to comply with all health and safety policies and procedures in accordance with the Health and Safety at Work Act 1974. This includes taking reasonable care of their own health and safety, as well as that of others who may be affected by their actions. The role involves using personal protective equipment (PPE) when necessary, following established safety protocols, reporting hazards or unsafe conditions, and participating in health and safety training. All Employees and Volunteers of Acorns must actively contribute to maintaining a safe and healthy environment and cooperate with the employer to ensure compliance with relevant health and safety legislation.

Environmental sustainability

All Employees and Volunteers of Acorns are required to support in minimising environmental impact wherever possible, including recycling, switching off lights, computers, monitors and equipment when not in use. Helping to reduce paper waste by minimising printing/copying and reducing water usage, reporting faults and heating/cooling concerns promptly and minimising travel. Where the role includes the ordering and use of supplies or equipment the post holder will consider the environmental impact of purchases.

Safeguarding

Acorns is committed to safeguarding and promoting the welfare of children and adults and expects all staff and volunteers to share this commitment. It is the responsibility of all staff to always safeguard and protect children and adults at risk, staff must report any concerns as per safeguarding policies and procedures which are available on Acorns internal systems. Every staff member must undertake regular mandatory safeguarding training at a level relevant to their role.

Data Protection and Confidentiality

All Employees and Volunteers of Acorns are required to comply with all relevant data protection laws, including the Data Protection Act 2018 and the General Data Protection Regulation (GDPR). This includes ensuring the confidentiality, integrity, and security of personal and sensitive information. All Employees and Volunteers of Acorns must handle all



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data in accordance with organisational policies and procedures, ensuring it is only used for its intended purpose and is not disclosed to unauthorised individuals. The role may involve safeguarding personal data, reporting any data breaches, and always maintaining strict confidentiality to protect both individuals' privacy and the organisation's legal obligations.

Equality, Inclusivity and Diversity

All Employees and Volunteers of Acorns are required to promote and uphold the principles of equality, inclusivity, and diversity in all aspects of their work. This includes ensuring that all individuals are treated with respect and fairness, regardless of their race, gender, age, disability, sexual orientation, religion, or any other characteristic protected by law. All Employees and Volunteers of Acorns must comply with relevant legislation, including the Equality Act 2010, and contribute to creating an inclusive environment that values diverse perspectives. The role involves actively challenging discrimination and bias and supporting the organisation's commitment to providing equal opportunities for all.

Other Duties:

- > To act as an ambassador for Acorns raising awareness of its charitable aims and objectives and enhancing its reputation through exemplary behaviour, conduct and team working.
- > To put the needs and interests of Acorns children and young people and their families first in all aspects of their work.
- > To ensure compliance with Acorns policies for diversity, employment, equal opportunities, health and safety, information governance and safeguarding.
- > To actively participate in a performance and development review process and any training and development identified to further enhance your role with Acorns.
- > Demonstrate innovation, seek continuous improvement, and share best practice with colleagues across the organisation
- > To be innovative, commit to continuous learning, researching new ideas, monitoring new technology advancements, sharing good practice across the team and colleagues.
- > To carry out any other reasonable duty as requested by your line manager.

Acorns adheres to the United Nations Convention on the Rights of the Child. As an employee you will be a Duty Bearer for Children's Rights and support all children to be Rights Holders.



Person Specification: CRM Data Project Lead

	Essential	Desirable
Qualifications	> A good level of education and digital confidence and capability.	> Relevant CRM, data, project management or systems qualification.
Experience	> Extensive hands-on experience undertaking bulk imports and exports of data. > Experience of working with CRM systems and data in a delivery or project environment. > Experience of managing data configuration, cleansing, recoding or data quality activity. > Experience of planning and delivering work to agreed milestones, managing dependencies and competing priorities. > Experience of working collaboratively with stakeholders across different teams. > Experience of working with external suppliers or partners to deliver agreed outputs.	> Experience within fundraising, marketing, digital or another customer-focused environment. > Experience of delivering CRM implementation or significant CRM change.
Knowledge	> Strong IT skills, particularly in MS Office and advanced Excel skills, including the use of V Look Ups, Pivot Tables and conditional formatting for data manipulation and preparation. > Proficiency in CRM systems such as Raiser's Edge, Salesforce, Donorfy or Donorflex > Good understanding of CRM data structures, data quality and the use of data to support reporting and segmentation. > Understanding of how CRM configuration and data can support fundraising activity and supporter journeys.	> Knowledge of fundraising CRM systems and/or fundraising platform integrations. > Understanding of fundraising compliance, data protection and best practice.
Skills and Abilities	> High attention to detail and accuracy. > Strong organisational and project delivery skills, with the ability to prioritise and meet deadlines. > Confident working with data and CRM systems and able to translate requirements into practical delivery. > Strong stakeholder management, communication and relationship-building skills. > Ability to identify risks, blockers and dependencies and take action to resolve them. > Ability to work collaboratively across teams while managing multiple priorities. > Strong written and verbal communication skills. > Ability to document processes and share knowledge to support sustainable ways of working.	
Other	> Passionate and committed to Acorns mission and values. > Willingness to learn, adapt and work across Fundraising, Data & Insight and Digital.	
Behaviours	> Build collaborative relationships across the organisation, creating a culture of cross function working. > Positive, enthusiastic approach & can-do attitude. > Curious, always seeking to understand and improve experience of customers. > Open to change and continuous improvement. > Innovative mindset and passionate about learning. > Commitment to the Acorns strategy & its success. > Driven in your approach to strive for excellence and build lasting partnerships for Acorns.	

Terms and Conditions of Employment

Job Title:

CRM Data Project Lead
12 month fixed-term contract

Responsible To:

Digital Fundraising Manager

Locations:

Acorns House
103 Oak Tree Lane
Birmingham
B29 6HZ

Carillon House
Chapel Lane
Bromsgrove
Worcestershire
B47 6JX

Hybrid role – office & home working

Salary:

£38,000 to £40,000 per annum

Notice:

8 weeks

Hours:

37.5 hours per week

Holidays:

27 days plus statutory bank holidays

Pension:

Contribution to Group Personal Pension Plan or NHS Pension Scheme (if already in scheme).

Life Assurance:

Acorns Group Life Assurance Scheme or NHS Pension Scheme Life Assurance cover (if already in scheme)

All terms and conditions will be detailed in writing together with Employee Handbook which must be read and observed.

