



Job Description

Job Title:	Data Manager / Salesforce Administrator
Location:	Woodstock, Oxfordshire
Reporting to:	Head of Policy and Communications
Responsible for:	N/A
Salary Band:	£28,000 - £41,309
Contract:	Full time permanent, with a probation period of six months

Plunkett Foundation is a national charity with a vision for resilient, thriving and inclusive rural communities. To achieve this, we support people in rural areas to set up and run a wide range of businesses which are genuinely owned by local communities, whereby members have equal and democratic control. Today, we represent over 800 'community businesses' in rural and urban areas throughout the UK, from shops and pubs through to woodlands, farms and fisheries.

Through our support for community businesses, we have a specific mission to create innovative, impactful and inclusive spaces.

We achieve this by helping community businesses to:

- Provide a wider range of services and amenities that communities value and need
- Stimulate the local economy through localised supply chains
- Boost opportunities for employment, training and volunteering
- Benefit people who are most disadvantaged and excluded in today's society
- Offset climate change through delivery of environmentally sustainable initiatives
- Harness digital technologies to enhance business performance
- Promote equality, diversity and inclusion by creating safe and welcoming spaces for all.

In practical terms, Plunkett raises awareness of the community business model UK-wide and provides business support and training to help these businesses start-up and go on to thrive. As a membership organisation, we also seek to represent the interests of rural community businesses through research, policy and public affairs.

How we work:

Plunkett Foundation operates as a team. This means that every member of staff is expected to support Plunkett as a whole, and as and when required, this means helping others to meet important targets or complete organisation-wide initiatives. As such, there will be times when you are asked to work on tasks outside of your job description – but it also means that the whole of Plunkett is there to support you when required.

We strive to live up to our values, and be inspiring, accessible, dedicated, inclusive and collaborative in the way that we work – both internally and externally – and we welcome applications from like-minded individuals. As a member of the Plunkett team you will demonstrate a knowledge, understanding and commitment to equity, diversity and inclusion and its application in all that we do.



Job Purpose:

This post sits within the **Information Hub** at Plunkett, a team that is responsible for managing all data collected and held by the Foundation. The purpose of the information hub is to promote and uphold an organisation wide commitment to good data management. The Information Hub underpins the organisation operation in respect of frontline support and membership. It also significantly contributes to our research, policy, engagement and communications output.

The FTE post is responsible for managing all Plunkett Foundation information and data, enabling Plunkett to provide a strong voice for the community business sector supported by robust evidence. The post will lead on the development of usable platforms and utilising a range of software to support our data strategy and fundraising activity.

The Data Manager will be confident in:

- clearly defining project targets and delivery plans in the set-up phase
- working across teams to raise the profile of their projects internally and ensure the buy-in of all staff to support key projects
- managing funder requirements whilst maintaining excellent relationships with them and wider stakeholders
- developing effective, robust and prudent business processes
- contribute to effective, robust and prudent financial management processes

As the Salesforce Administrator for the organisation, the post holder is responsible for maintaining the Salesforce platform and ensuring that all contracts and subscriptions associated with the Plunkett CRM are managed appropriately. The post holder will also lead on organisation wide training for colleagues in relation to Salesforce and the relevance to their role.

As a manager the role will lead on specific projects related to data management on behalf of Plunkett Foundation. This will include liaising and reporting to funders, working with a range of partners and ensuring that work is delivered on budget, on target and on time.

Principal Accountabilities:

There are five key areas of accountability:

1. Manage all data input and processing on behalf of Plunkett. This will involve:
 - Maintaining a Plunkett data map, which clearly articulates all the data points utilised by Plunkett
 - Respond to the data collection and/or processing needs of colleagues across the organisation
 - Identifying and implementing efficiencies in the Plunkett systems
 - Auditing the information held by Plunkett Foundation to maintain its accuracy, relevance and accessibility
2. Responsible for Plunkett Foundation Salesforce system. This will involve:
 - Acting as the system administrator and developer for Plunkett's Non-Profit Success Pack Salesforce CRM
 - Being responsible for Plunkett's four Experience Cloud Sites
 - Managing integrations of applications, such as Form Assembly and Zapier



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- Be the champion for Salesforce internally, encouraging an organisation wide commitment to good, accurate and up to date data
 - Manage on all contractual and licensing matters including (but not limited to) any additional subscriptions related to data collected, processed and held within Salesforce
 - Developing and provide a programme of training to colleagues, particularly focussing on project management processes and supporting the team to better use Trailhead for ongoing support needs
3. Lead on metrics monitoring and reporting for Plunkett Foundation. This will involve:
- Monitoring all appropriate metrics to track sector growth, organisational reach and influence
 - Working with colleagues to consider and implement new impact measurement metrics
 - Support Plunkett Foundation project managers to produce insights and impact reports relevant to funded work, corporate consultancy
 - Supporting the Senior Management Team to prepare appropriate reports for the board and Plunkett Foundation membership
4. Manage data compliance activity, working with the Head of Compliance and Operations. This will involve:
- Completing an annual data collection audit, removing or updating forms or contact points that are non-compliant
 - Implementing best practice standards across all data work
 - Attend training and development workshops to remain up to date on data compliance matters
 - Support the Head of Compliance and Operations with any specific reporting to the board
 - Support the Head of Policy and Communications to review data-related subscriptions and third party applications used by Plunkett in relation to annual budgeting processes
5. A wider range of tasks, as opportunities arise and capacity allows:
- Contributing to ongoing reviews of project management tools and processes
 - Supporting the Chief Executive and Senior Management Team with new business opportunities.

You will be expected to carry out any other duties that may reasonably be required in line with your main duties.

All Plunkett staff members are expected to adhere to Plunkett's policies and processes.



Person Specification:

PERSON SPECIFICATION

Plunkett Foundation is looking for someone who is:

- A creative thinker and able to propose and implement solutions to meet Plunkett's data requirements
- An exceptional communicator, with a strong track record of working with a range of stakeholders and building relationships that translate into tangible results
- Highly organised, with an ability to prioritise, and experienced in budget and project management
- Skilled at using Salesforce CRM systems to underpin project management and reporting
- A team player who thrives in a team-oriented, collaborative environment
- Able to make clear and concise decisions, to effectively manage a complex and demanding workload, expectations and priorities
- Target-driven, and determined to achieve objectives and outcomes
- Prepared to listen to and learn from community businesses and the Plunkett membership network, to ensure our services remain fit for purpose and relevant to their needs
- Flexible to travel and work after hours/on weekends as necessary