



# Candidate Pack

**CRM Impact  
Manager**

# Want to do something amazing?

Open Door is one of Merseyside's most dynamic and progressive independent charities committed to shaping change in mental health. Based in Birkenhead, we deliver a holistic and creative programme of services that support the wellbeing and mental health of young people and families, using innovation, arts and culture as catalysts for change.

All our programmes are free of charge and we have no waiting lists; we are committed to providing free, fast and effective mental health support at the point that people need it most. Our beneficiaries join our organisation as 'members' and can access a wide range of services including workshops, activities and individual support. Our offer is engaging and versatile, providing choices that aren't available through conventional mental health services.

open door 

**We apply creativity and innovation to everything that we do; our services are led by a dynamic team of staff and trained peer mentors who, using their own personal experiences and a range of effective tools and programmes, support individuals through to better times.**

We have two main sites in Birkenhead, and over the past 14 years have grown to become one of the largest independent providers of talking therapies in Merseyside and one of the most progressive organisations of our kind in the UK.

We were awarded the Queens Award for Voluntary Service in the 2019 Honours List, the Investing in Volunteers Chartermark in 2019 and most recently we were named as a winner of the prestigious Kings Fund x GSK Impact Awards for our excellent work in health and wellbeing.

Open Door is all about empowerment, culture and opportunity. Not only do we offer support services for our members, but we also provide our local community with a creative and social space, Bloom Building. From Bloom, we offer hot-desking, workshops, tenancies and more. We host art exhibitions, an eclectic events programme and a network of cultural and health partners who work together with Open Door to co-create a vibrant programme of activities for new and existing members, taking mental health support out of traditional, clinical models and into the heart of engaging, non-stigmatising arts and culture.

Our organisational values are:

- Human
- Fire
- Visionary
- Professionalism



# Our vision

What we hope to achieve in the longer term

Together our members, mentors and staff transform cultures around mental health. The times when we need support become moments of meaningful change. We all have opportunities to connect with brilliant people, transformative tools, and inspirational places.

# Our mission

Why we are here and what we do

Open Door exists to shape meaningful change in mental health. We create inclusive communities, joyful places and evidence-based programmes that empower people to be mentally well. What we do first-hand in Merseyside, we share with others, inspiring change across the UK.

Creativity and shared experience is at the heart of everything we do; we innovate, we collaborate, and we push for lasting change.

# Our future

Open Door Charity has been through a significant period of development over the past three years; we've taken on new projects and commissioned services supporting families and care experienced young people, we've significantly grown our staff and volunteer team and operate from two main sites in Birkenhead. We have established a robust senior leadership team, governed by a strong board of trustees and have just passed our 14th anniversary. We have some exciting projects in the pipeline and now is a great time to join the Open Door Charity to help us on the next stage of our development.

In our most recent staff survey, our team reported:

**100%**

of staff feel valued by their manager.

**100%**

of staff feel they are part of a supportive team and have good working relationships.

**100%**

of staff feel positive about the work they are doing at Open Door.

## A place to develop

Open Door Charity strives to be the best job you ever have. We understand that when we recruit passionate, driven and ambitious people we won't be the last stop in your career journey. We are committed to ensuring your time with us is as transformational and developmental as it can be for the charity and for your personal and professional development.

The ways we achieve this include:

- Access to networking events within the third sector and beyond
- Access to training opportunities within your role
- Regular one to one meetings with your line manager

“ODC is in a hugely exciting place.

We have been in the world for 14 years, delivering a dynamic and holistic package of services that are helping set the tone nationally in how mental health can be supported, where the mental health conversation sits and the power of deep human connection and collective experiences to bring about tangible change in peoples lives.

We have large scale commissioned projects which we now deliver independently and alongside regional and national partners, and are pressing ahead with creating what we believe will be the most progressive and spectacular wellbeing and creativity environment in the UK - Joy.

To achieve all of this we need the best people to come on board, so have focused efforts and resources in recent years on creating a workplace which is exciting, challenging and fun to be in, gets the best out of its people, supports one another and has the achievements of our people's purpose front and centre in our approach.

We will do everything we can to make this the best job you will ever have. We look forward to hearing from you.”

**Lee Pennington - Charity Director**



# Job description

Role: CRM Impact Manager

Working pattern: Full time 37.5 hours per week

Location: Bloom Building, Birkenhead. Hybrid working patterns available

Contract type: Permanent\*

Salary: £30,000

Reports to: Strategic Impact Manager

\*Dependent on a successful 3-month probationary period, demonstrating ODC values and excellent execution of responsibilities.

Other benefits:

- 25 days annual leave (pro rata) excluding bank holidays, plus annual Christmas shutdown
- Weekly staff yoga
- Opportunity to take part in quarterly team away days
- Cycle to work scheme
- Wellbeing support available
- Free eye tests



# Role Overview

The CRM Impact Manager is a specialised role that will focus on developing our use of the Beacon CRM and ensuring it's used to our best advantage throughout the charity.

You will lead on capturing and utilising data across the whole of the charity from the impact on our members, to socially focused programming, fundraising events, and income generation through grants and tenders. All the tasks you carry out will contribute to the core purpose of the charity, enabling us to transform the access to and experience of mental health support, for young people.

This is a new position within a new team, focused on the growth of the charity, offering the opportunity to enhance Open Door's approach data and impact and build new work, as we create new long-term partnerships.

Based at the Bloom Building in Birkenhead and soon within our new home 'Joy', the role offers a flexible and collaborative working environment, engaging with a wide range of internal and external stakeholders that align with Open Door's values and mission.

# Main Duties and Responsibilities

- Maintain accurate and consistent data within the Beacon CRM system
- Create of a clear demarcation of responsibilities for data
- Provide user support and troubleshooting for day to day issues
- Handle change requests and development work on a structured regular basis e.g.bi monthly
- Manage user CRM access and permissions
- Develop CRM guides for tasks and delivering training on the CRM
- Ensure internal teams are capturing data that is relevant and necessary
- Create new features in the CRM as required and test before implementation
- Use other tools (e.g. Zapier) to automate processes across the charity
- Identify IT needs in relation to data and report them to your manager
- Ensure data in the CRM is compliant with our data protection policy and cybersecurity best practice

# Main Duties and Responsibilities

- Ensure data in the CRM is compliant with our data protection policy and cybersecurity best practice
- Create tools and systems that can be used to further enhance our understanding and demonstration of impact, e.g. dashboards, statistical programming
- Work in partnership with other organisations to capture data and demonstrate impact in partnership work
- Produce internal monthly data that captures work across the charity
- Produce annual data to be used in the year end impact report
- Gather data and checking quality for monitoring and other reports
- Provide support to your manager with insights and analysis for reports and monitoring

# You will be a great fit if...

## You have this experience:

- Hands-on experience with a CRM system
- Experience of supporting non-data focused colleagues
- Experience of working independently and balancing multiple priorities and stakeholder needs
- Experience of automation tools e.g. Zapier
- Experience of website and CRM integrations
- Experience working with external stakeholders including IT providers

## You have these skills:

- Ability to evolve tools and processes to meet needs
- Ability to problem solve and troubleshoot CRM issues
- Strong attention to detail
- Excellent data management skills
- Skilled in data cleansing and analytics
- Skilled at communication and working with non-technical colleagues

# You will be a great fit if...

## You demonstrate these behaviours:

- Proactive and self-motivated, able to work independently and as part of a team (E)
- Strategic and creative approach to problem solving (E)
- Personable and confident communicator, able to build rapport with stakeholders (E)
- Empathetic, flexible, and adaptable (E)
- Calm and resilient under pressure (E)
- Passionate about Open Door's mission and values (E)
- Tenacious, with a commitment to high standards (E)
- Willingness to travel for meetings (E)
- Ability to represent the charity externally at events (E)
- Drive to stay up to date with sector developments (E)

# Any questions, get in touch

Email us:

[vacancies@opendoorcharity.com](mailto:vacancies@opendoorcharity.com)

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We are committed to having a diverse workforce and promoting equality, however, this is a work in progress, and we know we still have a way to go. We value and respect all differences in all people (seen and unseen) and we aspire to inclusive working experiences and an environment that reflects the communities we serve, where our people have equal access to opportunities, their voices are heard and they can contribute to our future.

We actively encourage applications from care leavers, BAME and LGBTQ+ candidates, those from lower socio-economic backgrounds, and those with a disability. If you are called for interview and have any accessibility requirements, please let us know.

To register your interest, please send a copy of your CV, completed equality & diversity form and cover letter outlining how you meet the requirements through to [vacancies@opendoorcharity.com](mailto:vacancies@opendoorcharity.com).

**We look forward to hearing from you!**



[www.opendoorcharity.com](http://www.opendoorcharity.com)

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