

Job Description

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| Job Title | Salesforce Lead |
| Department | City Bridge Foundation |
| Grade | D |
| Location | Guildhall/ Home working |
| Responsible to | Head of Managing Director's Office |
| Responsible for | N/A |
| Appointed Candidate's Signature | <p><i>Please sign and date here upon receiving your offer of employment</i> I confirm I have read the Job Description below:</p> <p>Full Name:</p> <p>Signature Date:</p> |

Purpose of Post

Under the direction of the Head of Managing Director's Office, to support the work of City Bridge Foundation by managing, customising and optimising Salesforce systems, including user and license management. To train and upskill staff in all areas of Salesforce to ensure effective management of their day-to-day workload and to facilitate external engagement with grantees/clients.

Main Duties & Responsibilities

1. Lead on the Annual IT Audit for Salesforce, but also devise and implement all procedures to be adhered to throughout the year to ensure we are 100% compliant.
2. Lead on developing and implementing all GDPR and Data retention best practice protocols within Salesforce, ensuring all integrated systems and data are GDPR compliant. (A)
3. Be the primary contact for the offsite technical Salesforce support team and respond to all in house technical queries from the wider team, resolving bugs in conjunction with the technical team. (A,I)
4. Lead on the development plans for use of Salesforce as a Customer Relationship Management system (CRM) for stakeholder engagement across our communications, events, Bridge Programme and wider Total Assets work.
5. Lead on the design and delivery of the use of Salesforce in support of the Charity's Social Investment workstreams to ensure the Charity has an effective management system in place.

6. Work with the City Bridge Foundation Data Analyst to document clear roles and responsibilities across the team to ensure that data is updated regularly and consistently.
7. Lead on the training and development of team members on Salesforce to build user confidence and experience, drawing on expertise from other team members as necessary. (A)
8. To develop and maintain a functional user guide/process map detailing all day-to-day user responsibilities i.e. for the Funding Officer's, Funding Managers and wider team, to ensure all day-to-day tasks can be delivered efficiently and with limited day to day support. (A,T)
9. Lead on the resolution of queries from grantees on the online portal that cannot be dealt with by the Funding Officer administration team to ensure a positive customer experience and feedback.
10. Lead on the identification and gathering of requirements from users and stakeholders to inform further development of Salesforce processes and implement them in conjunction with appropriate staff. (A, I)
11. Lead on the development and updates of the online grant making application forms and online monitoring forms, in particular for ad hoc funding programmes. (A)
12. Lead on the development, enhancement and maintenance of all Salesforce processes, automations, and customisations to continually improve the functionality of the database and user experience. (A)
13. Set up and maintain all user accounts for the team, amending permissions and access as required to ensure a well maintained and up to date database that satisfies all Audit requirements. (A)
14. Work in conjunction with the City Bridge Foundation Data Analyst to prepare and respond to internal and external information/data requests in a timely way. (A,I)
15. Lead on the implementation of all outcomes from the End-to-End Review of grant making processes on Salesforce, in conjunction with The off-site technical team and appropriate Officers to ensure the required changes are implemented on time and are fit for purpose.
16. Develop and maintain effective working relationships with officers involved in the delivery of City Bridge Foundation's services and work with Salesforce leads in other equivalent organisations to keep updated on best practice and to apply learning to City Bridge Foundation's own work.
17. To support the procurement process for the CRM software contract renewal process, to ensure a fit for purpose IT solution is sourced and procured for the organisation.



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18. Actively seek to implement the City of London Corporation's Occupational Health and Safety Policy in relation to the duties of the post, and at all times give due regard to the health and safety of both themselves and others when carrying out their duties.
19. Actively seek to implement the City of London's Equal Opportunity Policy and the objective to promote equality of opportunity in relation to the duties of the post.
20. To undertake any other duties that may reasonably be requested appropriate to the grade.

Signed: _____

Date: _____

Person Specification

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| Job Title | Salesforce Lead |
| Department | City Bridge Foundation |
| Grade | D |
| Trent Position number | |
| DBS Criterion | No DBS |
| Security Vetting Criterion | No security vetting is required |
| Politically Restricted Post Criterion | This post is <i>not</i> politically restricted |

Please find below the key skills, experience and knowledge required to undertake this post.

Professional Qualifications & Knowledge / Relevant Education & Training

Experience of managing a Salesforce database as a System Administrator and certified as a Salesforce Administrator or Salesforce Advanced Administrator or equivalent professional qualification or experience. (A)

Skills

- Ability to quickly acquire a good understanding of the current Salesforce system in place and its customisations, including the key issues and challenges associated with it and deliver the desired outcomes in a creative way. (A, I)
- Ability to gather and assimilate the organisation's requirements to support development of the Salesforce system and propose effective, fit for purpose technical solutions.
- Excellent communication skills with the ability to prepare and deliver training sessions and identify needs of the organisation. (A,I,T)
- Strong oral communication and interpersonal skills to discuss, develop and progress project work streams with a wider range of staff across the organisation and possess a confident, articulate and engaging communication style in meetings. (I)

Experience Required, including Budget Holding Experience (if appropriate)

- Significant experience of the Salesforce product and demonstrable hands-on experience in the administration and maintenance of Salesforce systems. (A, I)
- Strong experience of working in a team of professional officers, driving project activities and ensuring objectives are translated into effective plans to ensure delivery against them (A)
- Significant experience of implementing Salesforce configuration changes including (but not limited to): Experience Cloud, flows, fields, page layouts, record types, custom settings, dashboards and reports (A,I)

Recruitment – Note to Applicants

The qualifications, experience and technical skills will be used in the decision-making process for recruitment. Please give examples of how you have exhibited these behaviours in your previous role(s). It is essential you address the criterion marked as (A) on your application form in the section for supporting information

Be as specific as possible, we cannot guess or make assumptions, but will assess your application solely on the information provided. Try to provide evidence, by examples, where possible, of skills, knowledge and experience contained in this person specification.

Summary of Terms and Conditions of Employment

This summary is given as a guide and is not intended to form part of an individual's contract of employment.

Salary

The salary range for this job is £41,360 - £46,050 per annum inclusive of all allowances. This figure will be reviewed annually from 1 July in line with the pay award for other salaried staff within the City of London Corporation.

Contract

The position is offered on a Fixed Term Contract basis until 31st March 2026.

Hours of Work

Normal hours of work are 35 hours per week excluding lunch breaks, Monday to Friday, inclusive but the post holder shall be expected to work the hours necessary to carry out the duties of the position.

Frequency and Method of Payment

This is a monthly paid appointment and salaries are credited to a Bank or Building Society Account on the 11th of each month.

Annual Leave

There is an entitlement of 28 days annual holiday plus Bank Holiday. There are subsequent increases to entitlement to annual holiday according to length of service.

Sickness Absence and Pay

The City of London Corporation has a comprehensive Occupational Sick Pay scheme, details of which can be found in the Employee Handbook which will be made available to you upon commencement.

Pension

You will automatically be admitted to the City of London Corporation's Pension Scheme. Employees contribute between 5.5% and 12.5% of their pensionable pay to the scheme, depending on salary.

If you do not wish to join the Scheme you must make a formal declaration stating you wish to opt out. You may contact the Pensions Office directly should you have any queries relating to the Local Government Pension scheme and your entitlements under this scheme.

Continuous Service

If you join the City of London Corporation without a break in service (subject to certain exceptions) from another body covered by the Redundancy Payments (Local Government) (Modification) Order 1999, your service with that institution will count for the purpose of continuous service. The amount of continuous service which you have will affect your entitlement to certain contractual benefits; for example, annual leave, sick leave and maternity leave. A full explanation of Continuous Service is contained within the Employee Handbook.

Probationary Period

You will be employed initially on a six month probationary period. Should either party wish to terminate the employment during this period, then one week's notice will be required on either side, except for summary termination for gross misconduct.

Notice Period

One (1) month by either party after satisfactory completion of probationary period.

Learning and Employee Development

The City of London provides for financial support and time off for staff to study for appropriate qualifications which relate to their duties or undertaking professional skills update training. There is also an in house programme covering more general training needs.

Employee Volunteering Programme

The City Corporation, in line with its aims to contribute to a flourishing society, shape outstanding environments and support a thriving economy, offers employees paid special leave time during normal hours to encourage employees to volunteer their time and skills to Volunteer Involving Organisations (VIOs) operating within the Square Mile, London and beyond.

Full-time employees may take up to 2 days or 14 hours per year in which to volunteer, between 1 January and 31 December. For temporary and part time employees these hours are adjusted pro rata. Volunteering time can be taken in smaller bite size e.g. 2 hours a week over 7 weeks, where this can be accommodated by the City Corporation and meets the requirements of the volunteer organisation.



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