

Application Pack

CRM Project Manager



Introduction



Siobhán Haire
Deputy Recording Clerk

This is an exciting time to join us and make a real impact.

At Quakers in Britain we are working to bring Quaker values of peace and sustainability to the world, and support the Quaker community.

As part of a wider digital strategy, we are commissioning a new CRM to strengthen and simplify some of our core processes. We know our requirements, we've built a project team and we need a personable, persistent and organised project manager to deliver the system.

We hope the information in this pack will fire your interest. Quakers are inspired by faith to work for a just, peaceful, and sustainable world. Our staff team share those values and support that work as we seek to increase our impact.

This application pack background contains information about Quakers, the salary and benefits of working for us along with the job description/ person specification for the post.

If you want to join our friendly, collaborative team we look forward to receiving your application.

You will find in this application pack background information about the Quakers, salary and benefits of working for us along with the job description/ person specification for the post.

Regards,

Siobhán Haire
Deputy Recording Clerk

If you would like an informal chat about the role before applying please email Siobhán Haire at siobhanh@quaker.org.uk.



About Quakers

The Religious Society of Friends (Quakers) is a radical faith group with its roots in Christianity. It emerged in the mid-17th century as a group with no separate priesthood, and with a form of worship based in silence.

Quakers have been committed to peace, equality, simplicity and integrity throughout history, and are known for work to bring about social change over the years, such as on the abolition of the slave trade, the relief of suffering in wartime, improving living conditions for factory workers and the introduction of same-sex marriage.

You can read more about the story of Quakers at www.quaker.org.uk/faith.

About Quakers in Britain

We are the charity that works with and on behalf of all Quakers in Britain. Our staff and committees provide support and events for around 18,000 Quakers, who worship in 456 local meetings across Britain.

Supporting Quaker communities is a key part of what we do. We have staff working within reach of every Quaker meeting in Britain. They work closely with local Quakers to identify their spiritual and practical needs and help them become stronger and more connected. We are on hand to help Quaker communities thrive.

We organise Yearly Meeting, the annual assembly of the Quaker church in Britain. It's when Quakers gather in worship to connect, explore current concerns and discern the way ahead. This Spirit-led decision-making guides our work.

Quakers are inspired by faith to build a better world. We take forward this work for peace and social justice and raise public awareness of Quaker faith and values.

We are a registered charity with an annual turnover of around £10m. Responsibility for the charity lies with the fifteen trustees of Quakers in Britain, appointed from among the Quaker community.

The work of Quakers in Britain is carried out through six departments:

- **Quaker Life** supports Quaker communities in their life and worship, oversees Quaker outreach, provides training and organises events for children and young.
- **Quaker Peace & Social Witness** runs programmes supporting peace, economic justice, sustainability and criminal justice, through campaigning, training, placements, community empowerment and by supporting Quakers in local activity.
- **Quaker Church Affairs** manages the governance, events, and the shared identity and discernment of Quakers. It is underpinned by work on equity and justice in these structures.
- **Quaker Communications & Fundraising** promotes public awareness of Quakerism, provides advocacy, media, web and publications services to the organisation, and oversees fundraising from Quakers, Quaker meetings and Trusts.
- **Quaker Finance & Property** oversees the budget and finances of BYM, the work of our commercial trading subsidiary and our ethical investment portfolio and properties.
- **Quiet Company** is our wholly-owned trading subsidiary. It operates Friends House as a major conference venue and runs the building facilities. It also runs our Yorkshire office and Swarthmoor Hall, the historic home of Quakerism located in Cumbria. Each year, the Company gift-aids any profits or surplus to the charity to support and enable Quaker work www.quietcompany.co.uk.

You can read more about the governance structures of the Quaker organisation in Britain here www.quaker.org.uk/structure.

You can download our Trustees annual report and financial statements here: www.quaker.org.uk/annualreport.

Our values



Our Values

Quakers live by core values that flow from our faith. They are central to our relationships with other people and with the earth:

Peace

Quakers are best known for their deep commitment to peace. But we don't simply oppose war. We tackle the root causes of violence and challenge the systems that lead to war.

Equality and justice

Quakers believe everyone is equal. This leads us to challenge injustice and work with people who suffer injustice. We oppose all forms of discrimination and champion diversity.

Truth and integrity

Quakers strive to speak the truth with love. Treating others as we would want to be treated means being both honest and respectful in our words and actions.

Simplicity and sustainability

Quakers try to live simply and focus on the things that really matter: the people around us and the natural world. We call for a sustainable way of life that puts people and planet first.

The process of living out our faith is often called Quaker Witness – you can find out more about Quaker work by listening to our podcast: www.quaker.org.uk/podcast.



Working for Quakers in Britain



Quakers in Britain is a national charity employing 150 people. Our staff work remotely and from offices in London, Leeds and Cumbria. Its purpose is to work for, with and on behalf of Quakers across Britain.

About our organisation

Quakers is the name most commonly used for the Religious Society of Friends. Although we have our roots in Christianity, we also find meaning and value in the teachings and insights of other faiths and traditions.

In Britain there are about 18,000 Quakers. We have 456 local Quaker Meetings, grouped into 72 'area meeting' charities. All these charities are affiliated to Britain Yearly Meeting.

Quakers in Britain is a charity, formally known as 'Britain Yearly Meeting of the Religious Society of Friends'. The trustees are appointed by and accountable to British Quakers; and because this work is done for and on behalf of Quakers from the whole of Britain, the work we do is known as 'centrally managed work'.

A Quaker workplace

We aim for our workplace to be consistent with Quaker values - broadly the same as most well-run progressive organisations. For example:

- We expect staff to respect each person regardless of age, race, religion, gender, transgender status, sex, sexual orientation, disability, marital or civil partnership status
- We work to avoid unjustifiable and unlawful discrimination in our employment practices
- We strive to follow good employment practice, with clear and supportive line management
- We have a 1:4 ratio between the lowest and highest salaries
- We aim to be open and honest in all our work
- We avoid titles such as 'Mrs.' or 'Mr'

- Very few jobs with BYM are restricted to Quakers, although about 1/3 of the staff are Quakers or linked to Quakers in some way.

The Quaker way of life

The Quaker way is based on silent worship, as a way to help people connect directly to God. Quakerism began in Britain in the 17th Century. Its roots are in radical Christianity, although today not all Quakers call themselves Christian.

Quakers share a way of life rather than a set of beliefs. We seek to experience God directly, within ourselves and in our relationships with others and the world around us.

Quakers are ordinary people, who try to live their values they can. This leads many Quakers to work for a better world.

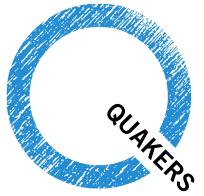
Values that are important to us include truth and integrity; simplicity; equality; peace; and sustainability.

You do not need to be a Quaker to worship with us at one of our meetings.

You can find out more:

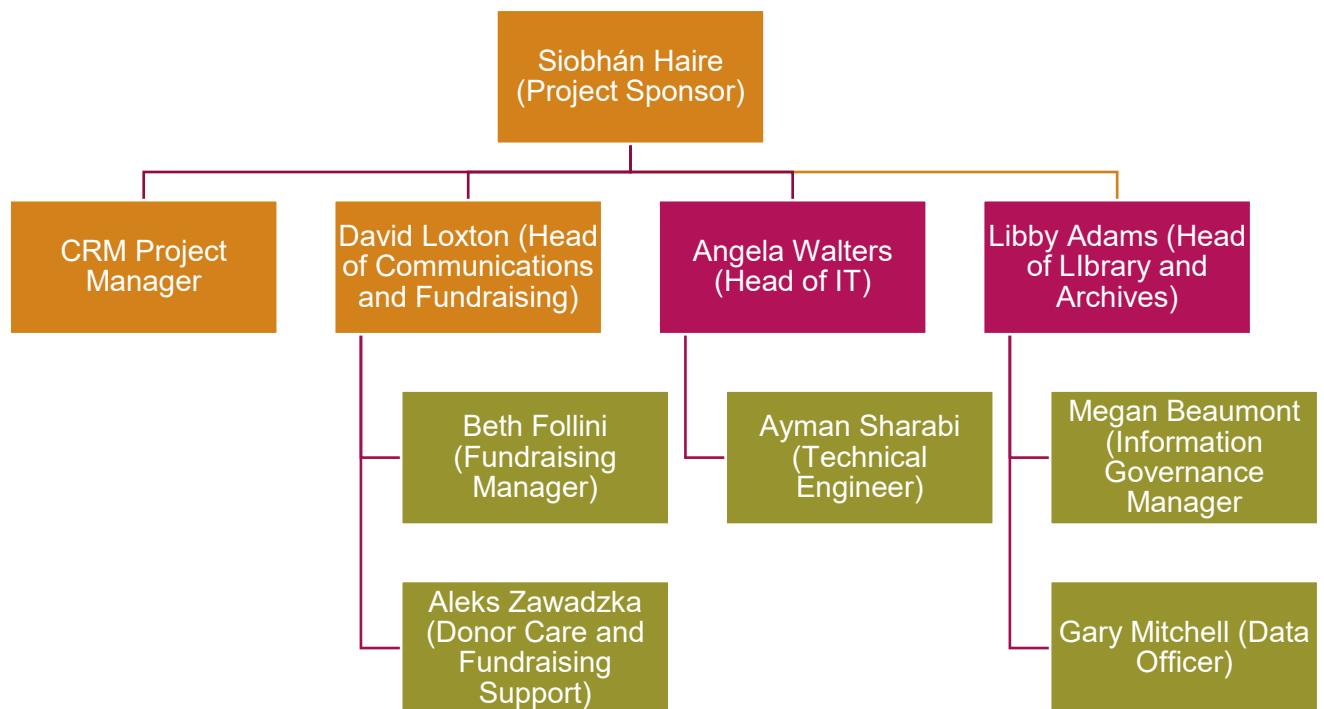
- From our website: www.quaker.org.uk.
- By reading Advice and queries which is an introduction to Quaker belief. Read it online at <http://qfp.quaker.org.uk>.
- By visiting the Quaker Centre at Friends House, which has leaflets and books, and volunteers who can answer questions.
- Or by requesting a free information pack from www.quaker.org.uk/more-information.

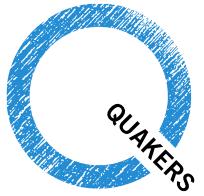
About the team



CRM Project Team

The CRM Project Team is a cross-departmental team which has been formed with the aim of delivering our new CRM. The team includes stakeholders from our data, IT, fundraising and governance teams, and will engage with colleagues across the organisation to ensure that the new system meets our needs.





Job purpose

The role of the CRM Project Manager is to project manage the implementation of the CRM.

1. Key accountabilities and main tasks

- Manage the implementation of the new CRM to acceptance and go-live, including quality assurance and test phases.
- Alongside project sponsor,
 - manage project scope, objectives, timelines, and deliverables in collaboration with departmental stakeholders
 - track spend, ensuring delivery within agreed budget and achieving value for money
- Coordinate cross-functional teams including IT, fundraising, communications, finance, information and governance specialists
- Develop and maintain comprehensive project documentation including risk registers, issue logs, progress reports and change management plans.
- Ensure the CRM system meets the charity's needs as described in an agreed specification document.
- Alongside specialist colleagues and suppliers:
 - Oversee data migration from legacy systems, ensuring data integrity, relationships and security and compliance with data governance standards
 - Ensure development and delivery of training programmes for all user groups
 - ensure compliance with GDPR and charity sector best practices and robust security and access controls.

- Manage relationships with implementation partners, consultants, and vendors, ensuring accountability and timely delivery.
- Monitor project progress against key performance indicators and report regularly to the trustee level project board and wider stakeholders.

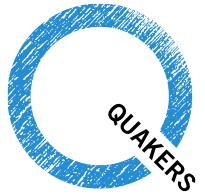
2. Intellectual demands

- Synthesise technical information and translate it into accessible language for stakeholders
- Participate in process to evaluate multiple CRM platforms against diverse organisational requirements
- Balance competing priorities and demands from multiple teams while maintaining project focus and strategic alignment
- Anticipate potential challenges and risks, developing proactive mitigation strategies
- Interpret charity sector-specific needs and configure solutions that align with mission delivery and regulatory compliance
- Apply creative problem-solving to overcome technical, operational, and resource constraints
- Understand the interplay between CRM functionality, organisational processes, and user behaviours
- Assess the impact of system changes on different user groups and adapt implementation approaches accordingly
- Influence and negotiate with diverse stakeholders to secure buy-in and manage expectations effectively
- Maintain awareness of technical integration requirements with other organisational systems

3. Judgements

- Determine and apply appropriate project methodologies
- Provide informed guidance to project sponsor and board about scope

Person specification



- changes, balancing functionality requests against timeline and budget constraints
- Alongside Project Steering Group and Project Board, assess vendor proposals and capabilities, selecting suppliers that best fit charity requirements
- Evaluate when to escalate issues to senior leadership
- Judge the readiness of the organisation for system go-live and make critical launch decisions
- Balance the need for system customisation against long-term maintainability and costs
- With project sponsor, determine appropriate levels of stakeholder involvement at different project stages
- Make informed decisions on data migration strategies, testing protocols, and contingency planning to safeguard data integrity and compliance

4. Use of resources

Human Resources:

- Coordinate and motivate team and departmental representatives
- Allocate tasks effectively across the project team based on skills and capacity
- Alongside Project Sponsor, manage external consultants and implementation partners

Financial Resources:

- Administer project budget of up to £250,000+ for software licensing, implementation, and training
- Control procurement expenditure and negotiate value-for-money contracts
- Track expenditure against budget and forecast costs throughout project lifecycle
- Identify opportunities for cost savings without compromising quality

Technical Resources:

- Oversee the configuration and deployment of CRM software infrastructure
- Coordinate with IT department on system integrations with existing platforms (email marketing, accounting, payment processing, webforms)
- Ensure efficient use of software licenses and system capacity

Time:

- Manage fixed completion deadline and interim project deadlines and coordinate multiple workstreams simultaneously
- Balance project delivery with business-as-usual operations to minimise disruption

5. Working conditions

- The post makes no unusual physical demands.
- Occasional travelling is required.

Other responsibilities

- Responsible for adhering to BYM's employee policies at all times
- To undertake other duties and responsibilities commensurate with the post.

This is list of the attributes that a Project Manager could have. We know that no-one will match up perfectly to the whole list. We are looking for the best mix of skills and experience that fits these needs.

Essential knowledge

- Comprehensive understanding of CRM systems.
- Strong knowledge of a suitable project management methodology (such as Agile, Waterfall, PRINCE2)



- High-level understanding of data protection legislation and its application to charity operations
- Knowledge of charity sector operations including fundraising, donor management, and volunteer coordination
- Familiarity with contract management
- Knowledge of change management principles and user adoption strategies

Essential qualifications

- Project Management Professional (PMP), PRINCE2 Practitioner, or equivalent professional certification
- Degree level education in Business, IT, Project Management, or related field (or equivalent professional experience)

Essential experience

- Minimum 3-5 years' experience in project management, with at least one successful CRM implementation project delivered to 100+ users
- Demonstrated experience managing projects with budgets exceeding £250,000, on time and within agreed scope.
- Proven track record of performance management of project delivery teams
- Experience working with cross-functional teams to develop and deliver a common vision
- Significant hands-on experience with major CRM platforms
- Experience managing vendor relationships and external implementation partners
- Essential skills
- Leadership: Ability to inspire, motivate, and manage diverse teams including staff and volunteers
- Communication: Strong written and verbal communication skills with

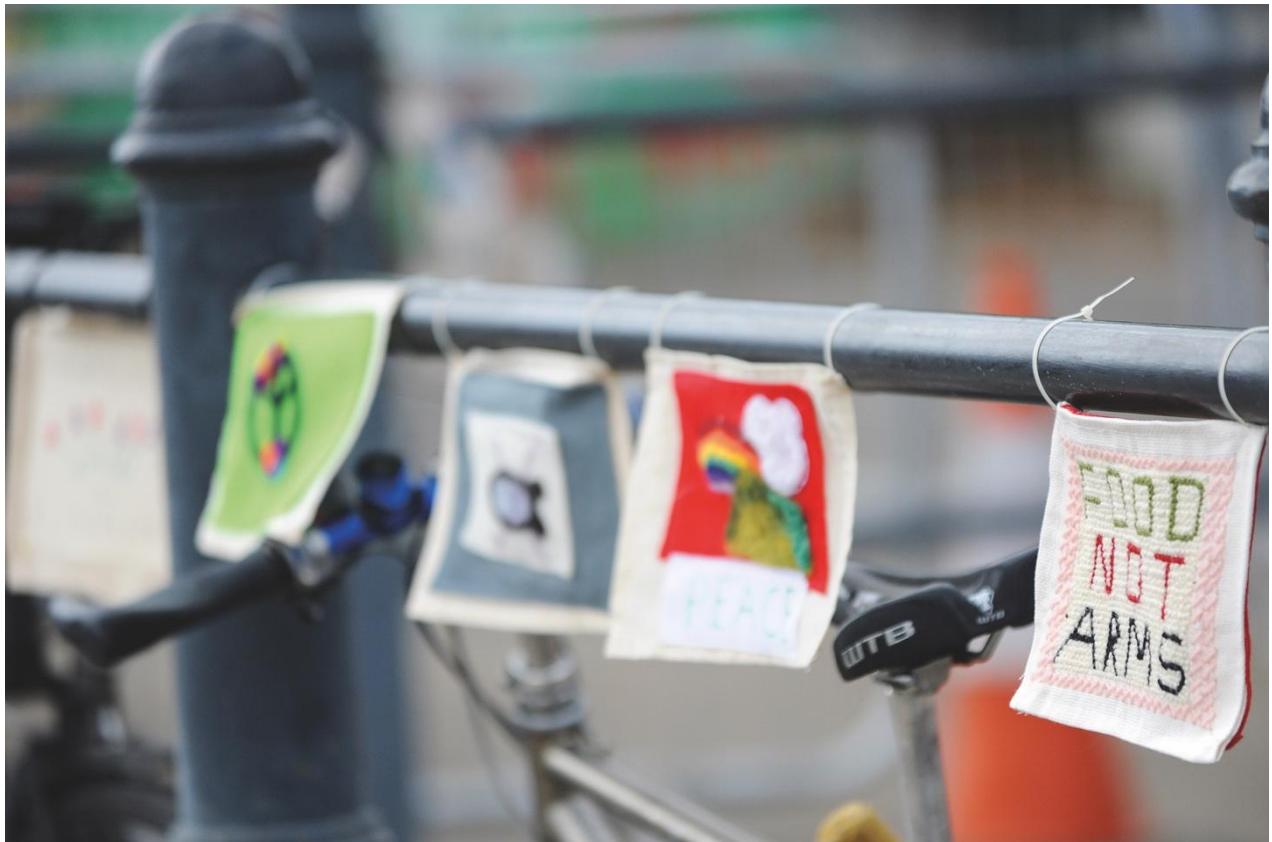
- ability to engage audiences from technical specialists to Trustees
- Stakeholder Management: Strong influencing and negotiation skills with ability to build trust and manage expectations
- Problem-Solving: Demonstrated analytical thinking and creative solution development
- Organisation: Excellent time management and ability to manage multiple priorities simultaneously
- Technical Aptitude: Comfortable user of digital technologies, able to translate technical concepts for non-technical audiences
- Adaptability: Flexible approach with ability to respond effectively to changing circumstances
- Attention to Detail: High accuracy in documentation, reporting, and process management
- Interpersonal Skills: Ability to build collaborative relationships at all levels of the organisation

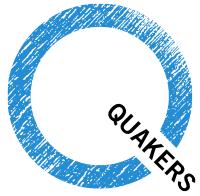
Desirables

- Previous experience working in the charity, non-profit, or social enterprise sector
- Knowledge of specific charity CRM platforms (Blackbaud, Salesforce Nonprofit Cloud, Beacon)
- Awareness of integration requirements between CRM and other systems (accounting, email marketing, payment gateways)
- Understanding of data migration processes and data quality management
- Certification in Agile methodologies (Certified Scrum Master, Agile Practitioner)
- Understanding of fundraising practices
- Experience implementing integrations between CRM and other platforms (MailChimp, QuickBooks, payment processors, webforms)



- Understanding of digital accessibility requirements and inclusive design principles





Salary

£51,153 per annum + £6,500 London Weighting (if applicable)

Location

Based at our offices in Leeds (LS2) or London (NW1), or at home if you do not live within reasonable commuting distance. Office-based staff can work at home some of the time by agreement.

Hours of work

Up to 35 hours per week, with a minimum of 21 hours per week. This is advertised as a full-time post but we will be flexible about the hours to be worked for the right candidate.

Flexible working options

Subject to location requirements above, we are open to discussions about flexible working patterns such as working from home or compressed working patterns.

Holiday

27 days a year plus bank holidays and three days for Christmas closure.

Subsidised café

In our London office, we have an on-site café which provides subsidised meals as well as a bookshop selling ethically sourced goods.

Cycle to work scheme

We offer a cycle to work scheme which helps you save money on a new work bike and spread the cost of the bike over monthly tax-free instalments.

Annual Season Ticket Loan

We will provide with a loan of up to £7,500 to cover the cost of your season ticket repayable in 11 monthly instalments.

Pension scheme

Quakers have a generous pension scheme where we contribute 8% of your salary and you contribute 3% of your salary. You have the option to increase your contributions should you wish and to pay your contributions via salary sacrifice.

Sick pay scheme

We have a very generous sick pay scheme: If you have less than 12 months service, you are entitled to full sick pay for 3 weeks followed by three weeks at half pay.

After 1 years' service, you are entitled to full sick pay for 3 months followed by 3 months at half pay, subject to a maximum of six months since the start of your service.

After 4 years' service you are entitled to full sick pay for six months followed by six months at half pay, subject to a maximum of 12 months.

Private Health Insurance

If you are off work due to sickness for more than 52 continuous weeks you will be eligible, subject to requirements of the scheme, to sick pay.

Employee Assistance

Quakers offers access to an independent, confidential employee assistance programme, which is available 24 hours a day.

Family Friendly Policies

Our family friendly policies give enhanced maternity and adoption leave. After one year's service by the 15th week before your baby is born or you adopt, you will be entitled to six weeks at full pay, 20 weeks at half pay and 13 weeks at SMP. Parents expecting multiple births will receive an additional two weeks of parental leave. Staff undergoing IVF treatment will receive 10 days paid leave to attend their appointments and up to 5 days paid leave for staff who wish to accompany their partner to appointments who are receiving IVF treatment in any 12-month period.

How to apply



Quakers have a faith commitment to equality and encourage and welcome applications for posts from people of all identities and backgrounds. As a result of our recruitment practices, individuals will be selected only based on their relevant skills, experience, qualifications and abilities. We work hard to ensure that a candidate's age, belief, disability, ethnicity, gender, gender reassignment, marital status, nationality, neurodivergence, race, religion, sex, sexual orientation or social class will not be a barrier to working for Quakers in Britain. As a Quaker organisation we expect all applicants and employees to uphold our values.

We aim to operate an equitable and user-friendly application process for all candidates. If you need any reasonable adjustments during the application process, please contact our People Team.

Quakers in Britain is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share and uphold this commitment. Our recruitment and selection process reflects our commitment to safeguarding, and the suitability of all candidates will be assessed during recruitment in line with our Safer Recruitment guidelines. Successful candidates will be subject to pre-employment checks in line with these guidelines.

The successful candidate will be required to undergo Safer Recruitment pre-employment checks, including:

- Right to work check
- References, including your current line manager

Apply online at www.quaker.org.uk/jobs.

The closing date for applications is:

9am on 2 March 2026.

We will consider your application immediately after the closing date and get in touch with you as soon as possible.

Interviews will be conducted by Siobhán Haire, David Loxton and Angela Walters, on **10 March 2026**.