

Position Description

Position Title	Salesforce Data Specialist (maternity leave cover)
Team	Operations
Employment Status	Full-time 12-month maternity leave contract
Award	Social, Community, Home Care and Disability Services Industry Award 2010 (Social and Community Services)
Level	Level 5
Reports to	CFO & Senior Manager, Digital Transformation
Direct Reports	Salesforce Administrator(s)
Version	January 2025

PURPOSE OF POSITION DESCRIPTION

The purpose of this position description is to document the purpose, desired candidate attributes and key responsibilities encompassed within the role. The key areas of responsibility and performance indicators are tied to performance review and career development. This document should be reviewed annually as changes in the organisation may result in the need to update the position description.

SECTION 1

OUR VISION

Lung Foundation Australia enables life-saving lung health and lung cancer research, and champions programs so that Australians with lung disease and lung cancer can live their best life.

OUR MISSION

By 2030, Lung Foundation Australia will be recognised as one of the world's most innovative and effective lung health charities and a fearless leader of lung health and lung cancer policy, programs and research.

STRATEGIC PILLARS

- Healthy lungs for all
- Australia's lung health research funding incubator
- Impactful and meaningful lung disease programs and support
- Valuing our people
- Purposeful leadership and ethical governance.

LUNG FOUNDATION AUSTRALIA VALUES

Our values are represented by **BE FAIR**

- **Bold** | be proactive and take risks that achieve our Mission.
- **Entrepreneurial** | be focused on outcomes and strive to find new ways of working, remembering we are profit-for-purpose.

- **Fair** | be equitable and work in the interests of all our stakeholders, particularly patients and their carers.
- **Agile** | be responsive and proactive to create positive change.
- **Innovative** | be inventive and find new ways of doing things that achieve our Mission.
- **Respectful** | be honest and work hard every day in every way – we are funded by the community they should expect nothing less.

OUR TEAM

Lung Foundation Australia is an award-winning profit for purpose organisation and national peak health and advisory body. Lung Foundation Australia is an Employer of Choice.

Lung Foundation Australia is embarking on a new corporate strategy following five years of sustained growth in brand, influence, funding, and reach. Our strong performance saw the Lung Foundation Australia named Non-Government Organisation of the Year in 2020 and 2023 and The Voice Projects Best Place to Work in 2020, 2021 and 2023. Before applying we encourage you to learn more about our Mission and impact by reading our Annual Impact Report

<https://lungfoundation.com.au/about/annual-reports/>

We operate from three offices: Brisbane, Sydney and Melbourne with a national footprint established by our support and research programs. We are committed to work life balance and flexibility in the workplace.

As our impact grows with increased government and community funding so does our team and our army of volunteer supporters. Over the next five years, Lung Foundation Australia is anticipated to increase its headcount by 100%+ as new offices are opened, and new projects are commenced.

SECTION 2

PURPOSE OF THIS ROLE

The Salesforce Data Specialist is responsible for driving the successful roll out of the Data Strategy and Management components of Digital Evolution. This role will be at the forefront of transforming our organisation into a data-driven leader. The position will lead the migration of our telehealth and Specialist Lung Cancer Nurse services to Salesforce, ensuring smooth integration and ongoing optimization. The role will drive the implementation and maintenance of Salesforce Experience Cloud and support other key Digital Evolution initiatives such as website redevelopment, marketing automation and the establishment of a data analytics program.

Additionally, a core component of this role will involve overseeing the current rollout of our first-ever data playbook, including training and updating documentation to match our evolving digital and data journey. This position will be a pivotal member of our newly formed Data Governance Committee, ensuring that best practices are embedded across the organisation. The role offers a unique opportunity to make a tangible impact as we revolutionise our approach to data. To support this, this position will manage a Salesforce Administrator who will take care of the ongoing maintenance of the Salesforce platform and associated applications, and support 60 plus users across the organisation.

SKILLS, QUALIFICATIONS AND KEY ATTRIBUTES REQUIRED (KEY SELECTION CRITERIA)

Qualifications

This role is ideally suited to a Salesforce Certified Administrator (CRT-101).

Experience

A minimum of 3 years' experience as a Salesforce Administrator is required and a record of successful system integration over multiple platforms. Experience in a Not-for-Profit environment including fundraising functions and Experience Cloud would be advantageous.

Knowledge and Skills

- Highly developed written and verbal communication skills, with the ability to communicate effectively to a range of different audiences.
- Excellent interpersonal skills, with the ability to build relationships across a diverse range of stakeholders, internally and externally.
- Strong business acumen to understand complex business rules and translate these rules to system requirements
- Strong understanding of the Salesforce NPSP platform, with the ability to build custom objects, formula fields, workflows, custom views, and other content of intermediate complexity
- Clear understanding of Opportunity, and Case management
- Proven ability to design and implement new processes and facilitate user adoption.
- Proven ability to work autonomously and cross-functionally across teams.
- A keen eye for detail.
- Strong project management experience
- Ability to identify service improvements.
- Proven ability to prioritise multiple tasks and respond to changing priorities and short deadlines.
- Experienced use of Microsoft Office software.
- Ability to travel interstate to other office locations as required.

Desirable

- Experience working with Salesforce Experience Cloud and marketing automation platforms

You will be required to undertake and maintain the following:

- National Police Check

KEY AREAS OF RESPONSIBILITY AND PERFORMANCE INDICATORS

The major areas of work, organised as key areas of responsibility and performance indicators, are outlined in this section.

Key Areas of Responsibility	Performance Outcomes
Data Strategy and Management	<ul style="list-style-type: none">• Lead and champion implementation of the data strategy and data playbook.• Lead the transition of our telehealth and Specialist Lung Cancer Nurse services to Salesforce, ensuring smooth integration and ongoing optimization.• Lead the implementation and ongoing maintenance of Salesforce Experience Cloud.• Develop and maintain a data and insights-driven culture.

	<ul style="list-style-type: none"> • Involvement in maintaining client data protection policies and processes to ensure customer safety and minimise risk. • Act as a core member of the Data Governance Committee and Data Governance Program. • Responsible for ensuring permission-based access is correctly maintained. • Support the development and implementation of a data analytics program including integration of data centralisation and visualisation platforms. • Support the redevelopment of the organisation website and transition to marketing automation platform Ortto. • Ensure up to date documentation of salesforce processes and workflows. • Assess all project requests, including identifying and scoping future opportunities and developments. • Customisation including creation of custom objects and fields, modifying record types, page layouts and related lists. • Ensure data compliance and governance guidelines are adhered to. • Processes created and maintained in declarative tools such as validation rules, process builder and Lightning flow. • Report templates and dashboards built according to user requirements. • Bulk updates of data completed using the data loader or data import wizard.
<p>Database understanding and capability</p>	<ul style="list-style-type: none"> • Delivery of training of staff across the organisation to help provide all employees with confidence in data quality and its ability to drive decisions at Lung Foundation Australia. • Ensure training documents/manuals are maintained and up to date e.g. Data Playbook and Process Guide.
<p>User and project management</p>	<ul style="list-style-type: none"> • Oversight of user management across the platform including Nintex, Payments2us, Form Assembly, Funraisin and Ortto. • Involvement in business intelligence system projects across the organisation. • Key project lead for the Digital Evolution in 2024-26. • Resolve issues of concern and implementation of risk mitigation strategies as required. • Work toward improving internal data literacy.

	<ul style="list-style-type: none"> • Ensure relevant data is collected and maintained to support personalisation and automation requirements and in accordance with the data governance policy. • Effective management of Salesforce user queries in a timely manner including monitoring and troubleshooting.
Stakeholder Engagement	<ul style="list-style-type: none"> • Develop and maintain effective relationships with internal and external stakeholders including third party providers.
Management of Salesforce Administrator(s) for continuous quality monitoring and improvement	<ul style="list-style-type: none"> • Ensure that efficiencies are maximised and LFA is capitalising on the full features and benefits of Salesforce. • Oversight of implementation of database improvements by the Salesforce Administrator. • Mentor and ongoing training of Salesforce Administrator(s). • Ensuring that duplicate management and data cleaning best practices are adhered to.
Team contribution and effectiveness	<ul style="list-style-type: none"> • Positive contribution to team environment through the demonstration of behaviours that reflect Lung Foundation Australia values – BE FAIR. • Work in a consultative manner with the senior leadership team and in collaboration with broader team to achieve goals. • Work synergistically within and across teams of Lung Foundation Australia. • Regular cross-organisation communication of program activity. • Participation in Lung Foundation Australia events and meetings as required. • Compliance with Lung Foundation Australia values, policies, procedures and statutory obligations. • Assist in the delivery of other activities depending on the needs of the team and organisation.
Workplace Health & Safety (WHS)	<ul style="list-style-type: none"> • Compliance with legislative and Lung Foundation Australia WHS Policy. • Ensure a safe working environment for self and others, including when working from home.

SECTION 3

REPORTING RELATIONSHIPS

This position reports to the Chief Financial Officer and Senior Manager of Digital Transformation as part of the Digital Evolution Team.

EXTERNAL RELATIONSHIPS

This position works with a variety of internal and external stakeholders to deliver projects and activities.

SECTION 4

PERFORMANCE APPRAISALS

Performance review and career development discussions will take place six monthly with the Chief Financial Officer.

SECTION 5

ACCEPTANCE OF POSITION DESCRIPTION

This position description is intended to describe the general nature of the duties performed. It is not intended to be a complete list of all responsibilities, duties and skills required of the position. Other appropriate duties may be assigned that are not listed in the position description.

My signature below indicates that I have reviewed, accepted, and received a copy of this position description.

(Employee name)

Date