



Helpdesk Officer

February 2023

Introduction

At 360Giving, we are looking for a Helpdesk Officer to provide support and guidance to enable funders to publish high quality open grants data using the 360Giving Data Standard. This will include acting as main point of contact for all enquiries to the 360Giving Helpdesk by email and telephone, developing and sharing guidance and preparing feedback and technical data support to fundes, providing online 1-1 support calls, as well as supporting users of 360Giving data and tools to access our products and services.

This is a public facing and hands-on role which will engage directly with 360Giving's target audiences and key stakeholders, and play a crucial part in outreach to potential and existing publishers through speaking at events and providing training, writing guidance and supporting development of promotional materials. This new post reports to the Head of Support and Services and is ideal for someone who enjoys hands-on data work and has a love for providing customer support and sharing their knowledge with others.

We are looking for someone interested in charity and funding data, with experience of providing accessible technical and practical support to people with a wide range of data skills and experience. This is a varied and interesting role for a good team-player who is customer-focused, conscientious and well organised, with excellent communication and customer service skills. We are looking for someone keen to learn and work with initiative to become the expert main point of contact for 360Giving's evolving Helpdesk function and help us deliver our strategic goals to increase the amount, quality and usefulness of data available for informed decision-making.

Terms

Salary:	£32,000 per annum
Hours:	37.5 hours a week (full time)
Contract type:	Permanent, subject to 3-month probationary period
Location:	Remote. Regular UK travel and attendance at meetings will be required, including typically 2 - 4 days a month in London.
Line Manager:	Head of Support and Services

This is a permanent position and is not subject to additional funding being secured.

Job Purpose

The Helpdesk Officer is responsible for providing practical and technical support and guidance to help grantmaking organisations publish their grants data, and acting as first point of contact for queries to access 360Giving's range of products and data services.

The role involves recruiting new grantmaking organisations and ensuring that grantmakers are supported through the whole 360Giving publishing process, enabling them to be self-servicing whenever possible, and providing guidance on sharing their data and improving data quality, tailoring when required to ensure the information is accessible and useful for a wide range of audiences and skill levels.

This is a hands-on and public facing role, responsible for day-to-day delivery of 360Giving's Helpdesk functions, providing guidance via email and telephone and online 1-to-1 support, as well as presentations and training to groups.

The Helpdesk Office will improve existing guidance and develop new written materials based on user needs and feedback, providing case studies and insights for use in comms materials and contributing user perspectives by testing and inputting into tools development. This role is also responsible for maintaining contacts and publisher support records in 360Giving's CRM and leading on the production of accurate and timely monitoring of publishing and the Helpdesk for board and funder reporting.

About you

The postholder will be customer-focused, proactive, adaptable, flexible and can work independently using their initiative and judgement to manage the day-to-day functions of the 360Giving Helpdesk, as well as resolving non-routine and complex support queries.

We are looking for an outstanding individual to join our small friendly team in a role that will play a crucial part in delivering our goal to increase the amount, quality and usefulness of data available for informed decision-making. The ideal candidate will be an adaptable and proactive customer service professional with an excellent working knowledge of Excel who enjoys helping people to resolve issues and develop their confidence and skills. Could this be you? Your love for learning new things and sharing your knowledge with others means you'll be able to support people of all technical abilities to build confidence and understanding of how to share open grants data. You'll be an excellent communicator who is comfortable sharing practical and technical guidance with a wide range of stakeholders; in writing, through one-to-one support and presenting to groups. You'll be an organised, self-motivated and customer-focused team player who is flexible and thrives working in a varied role as part of a

small team. Most importantly, you'll have a passion for helping people to develop the skills needed to publish open grants data and be committed to 360Giving's mission.

About 360Giving

360Giving is a unique initiative. We aim to inspire best practice in grantmaking and leverage open data to help achieve this. Watch our short 'About us' video to find out more:

www.threesixtygiving.org/about.

Our vision is for UK grantmaking to be more informed, effective and strategic

We help UK funders publish open, standardised data about the grants they make, and support people to use this data to improve charitable giving.

When funders publish information on who, where and what they fund using the [360Giving Data Standard](#) it means they are sharing it in a way that others can access and use for free.

Because the data is standardised, it can be looked at and analysed all together, helping us to understand grantmaking across the UK. Having this information means funding can be more informed and effective.

Since we were founded in July 2015, we have worked with over 240 funders to publish their grants data openly using the 360Giving Data Standard. This means that, for the first time in the UK, it's possible to see and analyse grants awarded by different funders all together. This data is transforming the knowledge base of the whole sector. We've also developed tools that make the data easier to access and use. For example, our free search engine for grants data, [GrantNav](#), and our tool for visualising the data, [360Insights](#).

In 2022 we launched our strategy: 'Unleashing the impact of grants data': www.threesixtygiving.org/unleashing. In it we set out four ambitious goals:

1. Increase relevant data available for informed decision-making
2. Improve the quality and depth of data for increased usefulness
3. Enhance data use for greater impact
4. Lead and influence practice for impact

The 2022-25 strategy marks a step-change for the charity, so this is an exciting time to join the organisation and shape our future, as we work to shift the norm from funders sharing data to using it, and create a permanent transformation in data culture and practice.

Our team

Our small team of six staff members punches well above our weight, working with partners to extend our impact. We all have a role to play and our personal commitment, curiosity and collaborative approach supports a welcoming and inclusive culture.

Diversity, Equity and Inclusion

We are particularly interested in improving the diversity of our team. We recognise the positive value of diversity, and want to promote equality and challenge discrimination. It is vital that our work reflects the considerations for the breadth of the sector that the data records. So we welcome applications from all suitably skilled and experienced people, and particularly from candidates from black and minoritised backgrounds, who are underrepresented in the philanthropy, data and technology sectors we are working in, and in our current staff team. You can [read more about our Diversity and Inclusion policy and approach here](#).

Job Description

Note: this is not a definitive list and the role will change and evolve over time. This is a new post, and flexibility will be required. The role will report directly to the Head of Support and Services and will also work closely with the other managers – [see roles in the team](#).

Core responsibilities

Responsibility – initial % to be reviewed after probation		%
1	Support and engagement with current and prospective publishers of 360Giving grant data	50%
2	Outreach to current and prospective 360Giving publishers	15%
3	Develop guidance, content and support testing of tools	15%
4	Maintain internal records and lead monitoring and reporting	10%
5	Other duties	10%

1. Support and engagement with current and prospective publishers

- a) Be the main contact for publisher enquiries and day-to-day relationship management with publisher contacts.
- b) Responsible for independently managing all enquiries end-to-end by email, telephone and meetings, providing timely responses with a high level of customer service.
- c) Lead meetings and calls, attending as sole member of 360Giving team. Provide online 1-to-1/office hours style support to publishing enquiries booked through the website.
- d) Develop insights on publisher enquiries, responding to needs and promoting 360Giving services to prospective and current publishers, based on insight.
- e) Provide tailored guidance to people with a range of technical and data skills.
- f) Engage with current publishers on improving data quality and frequency of updates with personalised approaches.
- g) Support consultancy services including data cleaning and data enrichment for publishers, where required.
- h) Provide helpdesk support beyond publishing support where required for new and existing products and services
- i) Manage Google Colab notebooks/templates, including liaising with external users to support their use.

- j) Identify opportunities to improve existing and develop new communications, email templates and helpdesk process flows to provide efficient and consistent support.

2. Outreach to current and prospective 360Giving publishers

- a) Outreach and speak at/participate in external events representing 360Giving to our different target audiences.
- b) Deliver online and in-person group training and workshops, where required.
- c) Support for communications, engagement and resources development.
- d) Work with the communications team to develop publisher recruitment and data quality campaign materials, support workshops including as a presenter.
- e) Develop proactive, tailored approaches to support the recruitment and publication of high-quality data.
- f) Identify and share case studies of publishers for use in comms and engagement materials.
- g) Contribute content to the 360Giving blogs, newsletter, social media and other content to support communications and marketing.
- h) Support development of the [Resource Library](#) by identifying and signposting to relevant 360Giving and third-party resources and external data sources, based on publisher feedback.

3. Develop guidance, content and support testing

- a) Use insights from publisher support to draft guidance and documentation to enable publishers to be more self-servicing.
- b) Lead development of new publisher guidance drafting text and resources, including writing bespoke guides for publishers and subgroups of publishers.
- c) Develop data support resources in a wide range of formats.
- d) Contribute publisher perspectives for upgrades and tools development.
- e) Participate in user testing of tools and guidance as a super-user, providing feedback on bugs and enhancements.

4. Maintain internal records and lead monitoring and reporting

- a) Maintain and add to the CRM database of contacts and publisher support records.
- b) Maintain helpdesk documentation and processes for effective cover during absences.
- c) Set up monitoring and reports to extract insights.

- d) Lead on production of accurate and timely monitoring of publishers and helpdesk function including for board and funder reporting, as well as internal support including one-off queries and support for other team members.
- e) Develop reporting to respond to organisational needs. Present the results at team and Board meetings, as required.
- f) Develop Customer Service Level Agreements and deliver to agreed standards, monitoring performance.
- g) Evaluation of the Helpdesk support including compiling feedback and support for customer satisfaction surveys.

5. Other duties

- a) Manage own workload, able to prioritise and take initiative.
- b) Maintaining relationships with external agencies and suppliers, as needed.
- c) Support the day-to-day operations of 360Giving and contribute to our overall aims and objectives.
- d) Build strong and effective working relationships with colleagues across the charity, leading and participating in cross-functional projects.
- e) Keep up to date on best practice – particularly changes to data practice, grantmaking databases, Microsoft Excel.
- f) Operate in accordance with our values, policies and procedures.
- g) Promote the work of 360Giving and participate in any other activities as necessary, including representing 360Giving in external meetings and working groups.

Undertake other duties as may be reasonably requested as part of a collaborative team.

Person Specification

Note: It is essential that all applicants have a legal right to work in the UK for at least 2 years.

Also able to travel for UK meetings and events and to London regularly for working and meetings.

Skills and experience

Essential

- Experience of responding to customer queries and/or providing helpdesk support via telephone, email, and via video calls or face-to-face.
- Experience of using Excel to manipulate and transform data.
- Experience of using a CRM system to manage contacts and maintain customer records.
- Able to explain technical concepts in an accessible way.

- Experience of maintaining and preparing user guidance.
- Excellent oral and written communication skills, to a variety of audiences, adjusting to different levels of understanding and using plain English.
- Strong organisational skills and the ability to manage a diverse workload with a high level of flexibility to meet changing demands, as required to work collaboratively in a small team.
- Exceptional attention to detail.
- Patient and calm with excellent active listening skills.
- Manages pressure effectively, able to multi-task and prioritise effectively.
- Motivated to learn new skills and share knowledge with others.
- Interest in the UK charitable giving sector and how data sharing can make it more impactful.

Desirable

- Experience delivering workshops online or in person.
- Experience of working with civil society organisations and understanding of the philanthropic sector.
- An interest in open data initiatives and civic technology, and an understanding of how they support access to information.

Personal characteristics and attributes

- **Purposeful** – focused and passionate, strategic, proactive and flexible to achieve aims. A passion for using data to make a real difference.
- **Open** – open to learning new skills and changing, generously sharing knowledge, friendly and approachable.
- **Curious** – inquisitive, tries different approaches, keen to learn. A proactive and self-motivated learner.
- **Collaborative** – work as part of a team and with external partners, sensitive and adaptable to the needs of others, roll up your sleeves and get involved. Goes the extra mile for others.
- **Inclusive** – committed to inclusivity and accessibility, celebrating diversity.