ROLE PROFILE

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| Title | PMERL and Salesforce functional admin specialist (M&E) |
| Functional Area | Monitoring Evaluation Research and Learning |
| Reports to | Director of Monitoring Evaluation Research and Learning  |
| Location | Woking | Travel required | Limited |
| Effective Date | 1/3/19 | Grade | IH4 |

role PURPOSE

As part of the Monitoring Evaluation Research and Learning (MERL) Department , the primary role of the PMERL and Salesforce functional admin specialist is to understand, maintain, advise on and troubleshoot the Salesforce, Vera, Taroworks and OpenFN, tools which comprise a system known as “PMERL” from an M&E functional utilisation perspective. This role will be pivotal in ensuring utilisation, governance and application aligned to PM and M&E frameworks and operating standards and procedures. This role will work closely with both the Y.O.D.A. Programme and IT operational teams who support PMERL from an IT perspective as well as leading engagement with third-parties working to support the platform.

Dimensions of the Role

This role has no direct reports , and has an international reach acting as a key PM and M&E functional point of contact for many different stakeholder groups at all levels in the organisation including national offices, country offices, regional offices and the Global Hub.

This role is line managed by the Director of MERL but is matrix managed by both the Director of MERL and Director of Programme Delivery and Resources as far as the execution of the accountabilities of the role is concerned.

Accountabilities

**Functional admin specialist**

* Primary M&E functional admin specialist of PMERL for Plan International with an ability to understand all functionality available and provide training and communication.
* Ensure PMERL interfaces effectively with related systems, e.g. ERP, ChildData and the data platforms (data warehouse, BI and analytics).
* Acts as subject matter expert, together with other functional specialists, for M&E processes and systems and maintain in-depth knowledge of available and emerging functionality of PM and M&E system and Salesforce platform.
* Support ongoing design and lead testing on system enhancements and new functionality and any integrations with D365
* Attend M&E management meetings and recommend any enhancements to PMERL.
* Help define/ensure Plan International alignment with all agreed PMERL governance; including PM and M&E framework and operating standards/processes/procedures.
* Support on-going delivery of training requirements to M&E teams across Plan International in order to support the full utilisation of PMERL including system changes/enhancements and on boarding new PM and M&E staff.
* Attending external meetings, wokshops and conferences to ensure Plan is aware of trends and future roadmaps across the industry.

**System Support**

* Support M&E teams in the use of PMERL
* Working with the Applications Team in IT especially their Salesforce Admin, managing, responding and resolving tickets and support issues by system users across Plan International
* Review on quarterly basis, with IT, and the D365 system specialists, support in line with PMERL releases and agree which features should be enabled to support PM and M&E functionality in PMERL and across the integration with D365.
* Review issues reported providing functional support to resolve these and highlight any related training needs

**System Utilisation:**

* Increase adoption of the PMERL by M&E staff, line managers and employees and provide continuous updated training and communication materials.
* Monitor use of the system and provide regular updates.
* Understand how PMERL can be used most effectively to support PM and M&E processes and frameworks.

**M&E Data and Reporting/MI:**

* Support the use of the PMERL as the primary source of accurate data relating to PM and M&E through the Data Warehouse.
* Partnering with PM and M&E Business Analysts, PM and M&E leads, support the development and maintenance of a consistent set of M&E dashboards and reports within Salesforce/Vera for use by PM and M&E and global, regional and country leadership.
* Support the PM and M&E Business Analyst to manage new report requests – review requirements, assess against existing reporting and, if required, establish new reports in PMERL and/or Data Warehouse.

**Integrations**

* Working with Data teams, such as Data Warehousing and BI teams to integrate data extraction and utilisation within the broader reporting requirements.
* Working with ERP and Y.O.D.A. Programme Management teams to integrate project data across the systems.

**Ongoing Continuous Improvement:**

* Review PM and M&E systems functionality regularly, implement/upgrade functionality to support Plan International globally.
* Working with PM and M&E Business Analysts regularly review and update training needs and materials for PMERL.
* Working with PM and M&E Business Analysts regularly review and update PMERL reporting requirements.
* Supports in the creation and deployment of customer surveys/other forms of feedback on processes and systems from the organisation.
* Working with PM and M&E Business Analysts and wider Y.O.D.A Programme, responsible for training employees across Plan International Inc. and National Offices on system usage & upgrades
* This role will also have an emphasis on determining how to innovate through automation, process improvement and system enhancement whilst focusing on continuous improvement.

**Plan International Policies**

* Ensures that Plan International’s global policies for Monitoring Evaluation Research and Learning (MERL), Data Privacy, Child Protection (CPP) and Gender Equality and Inclusion (GEI) are fully embedded in the relevant aspects of PMERL accordance with the principles and requirements of the policy including relevant Implementation Standards and Guidelines as applicable to their area of responsibility. This includes, but is not limited to, ensuring staff and associates are aware of and understand their responsibilities under these policies and Plan International’s Code of Conduct (CoC), their relevance to their area of work, and that concerns are reported and managed in accordance with the appropriate procedures.

Key relationships

* Project Management team in DPA Department
* Y.O.D.A. programme pillars
* Regional, Country & National Office functional specialist PM and M&E teams
* PM and M&E and Taroworks Super users
* IT and infrastructure teams, including the Applications Team Salesforce administrator
* Y.O.D.A and departmental Leadership Teams
* Sponsorship Department for Taroworks DDC
* Vendors & Suppliers
* Peer organisations

Technical expertise, skills and knowledge

**Essential**

* Proven experience of supporting programme and project delivery (programme effectiveness) and M&E through Salesforce systems in a large and matrix organisation.
* Knowledge of programme and project management (programme effectiveness) and M&E operations, principles, practices and processes.
* Experience of business process design and mapping.
* Ability to understand programme and project management (programme effectiveness) and M&E workflow and lateral processes, understanding where to probe for inefficiencies and clarity and to lead these discussions with the organisation.
* Experienced in the use of reporting tools to develop standard and ad hoc reports.
* Customer focused and strong influencing and stakeholder management skills.
* Excellent understanding and application of MS Excel, Visio
* Must be adaptable and able to work independently on multiple tasks, prioritise workload effectively and meet deadlines in a fast paced environment.
* Experience in setting metrics and analytics and the ability to analyse data for operational and strategic decision making.
* Strong analytical skills and robust problem solving skills.
* Attention to detail; accurate and observant.
* Fluent in English with strong verbal and written communication and interpersonal skills.
* Salesforce Certified Administrator.

**Desirable**

* Spanish and/or French verbal and written communication skills is an advantage
* Bachelor’s Degree – Development, Business Administration, IT or other related field.
* Good project management skills and/or Project Management qualification

Plan International’s Values in Practice

**We are open and accountable**

* Promotes a culture of openness and transparency, including with sponsors and donors.
* Holds self and others accountable to achieve the highest standards of integrity.
* Consistent and fair in the treatment of people.
* Open about mistakes and keen to learn from them.
* Accountable for ensuring we are a safe organisation for all children, girls & young people

**We strive for lasting impact**

* Articulates a clear purpose for staff and sets high expectations.
* Creates a climate of continuous improvement, open to challenge and new ideas.
* Focuses resources to drive change and maximise long-term impact, responsive to changed priorities or crises.
* Evidence-based and evaluates effectiveness.

**We work well together**

* Seeks constructive outcomes, listens to others, willing to compromise when appropriate.
* Builds constructive relationships across Plan International to support our shared goals.
* Develops trusting and ‘win-win’ relationships with funders, partners and communities.
* Engages and works well with others outside the organization to build a better world for girls and all children.

**We are inclusive and empowering**

* Seeks constructive outcomes, listens to others, willing to compromise when appropriate.
* Builds constructive relationships across Plan International to support our shared goals.
* Develops trusting and ‘win-win’ relationships with funders, partners and communities.
* Engages and works well with others outside the organization to build a better world for girls and all children

Physical Environment

Typical Office environment – some ad-hoc international travel may be required

Level of contact with children

Low contact: No contact or very low frequency of interaction