



POSITION DESCRIPTION

Project Officer – CRM

Fixed term to 30th June 2027

Employment framework: Social and Community Services (Western Australia) Interim Award, Level 5

PRIME FUNCTION / KEY RESPONSIBILITIES:

The Project Officer will support the effective operation, enhancement and ongoing development of the organisation's customer relationship management system, SugarCRM. Working closely with internal stakeholders and the external vendor, the role will assist with system testing, issue identification, process improvement and the implementation of changes that support business needs. The Project Officer will help ensure the CRM system is fit for purpose, reliable, user-friendly and aligned with organisational requirements.

The role is also responsible for developing clear user guidance materials, supporting end-user training, preparing reports and maintaining effective communication between users, management and the system vendor. This position requires a practical understanding of CRM systems, strong organisational skills and the ability to translate business needs into clear documentation, testing outcomes and system support activities. The Project Officer will contribute to continuous improvement by promoting consistent system use, supporting data quality and helping staff build confidence in using the CRM effectively.

Mental health is a fast-moving sector, and this role will come with great variety and may see you lend a helping hand on projects and events throughout the year in addition to regular duties.

CORE SKILLS AND ATTRIBUTES FOR THIS POSITION

- **Values Driven:** The ability to demonstrate kindness, respect, integrity, connection, courage and social justice.
- **Flexibility:** The capacity to work and act flexibly in order to meet peer and organisational goals.
- **Collaborative:** A demonstrated commitment to working collaboratively and constructively with others including consumers, their families/carers, staff, volunteers and sector partners.
- **Creative and inquisitive:** Capacity to contribute to developing and evaluating innovative approaches with new and fresh ideas and a positive approach.
- **Organized and Structured:** Demonstrated ability of solid time-management, organization and prioritization skills.
- **Leadership and initiative:** A demonstrated ability to proactively take carriage of specific tasks, programs and projects and to exercise sound judgement in seeking feedback and direction.

BRIEF STATEMENT OF DUTIES / PERFORMANCE AREAS

A. CRM PROJECT

- Support the administration, maintenance and continuous improvement of the Sugar CRM system.
- Coordinate and undertake basic user testing of scheduled updates.
- Identify, document and track system issues, defects and improvement opportunities.
- Liaise with the CRM vendor and internal stakeholders to communicate requirements, monitor progress and support issue resolution.
- Develop, review and maintain user guides and training resources.
- Deliver or coordinate training and support for system users to promote effective and consistent use of the CRM.
- Assist with the development of reports, dashboards and data extracts to meet operational and management reporting needs.
- Provide general project and administrative support related to CRM improvement activities.

B. QUALITY IMPROVEMENT

- Participate in ongoing evaluation and quality improvement activities and programs in CoMHWA.
- Participate in professional and performance development programs as required.

C. GENERAL

- Identify and report risks to business operations and objectives.
- Represent CoMHWA on various committees, working parties and reference groups as required.
- Identify and progress opportunities to maximise longer-term sustainability, outcomes and impact of CoMHWA activities.
- Collect quantitative and qualitative data as required by the CEO or their delegate.
- Prepare and deliver written and verbal presentations as required by the CEO or their delegate.
- Conduct all activities in compliance with relevant legislation including Equal Employment Opportunity, Occupational Health and Safety, and all policies, procedures and guidelines as determined by CoMHWA from time to time.
- Perform other duties as required by the CEO or their delegate.

SELECTION CRITERIA

IMPORTANT INFORMATION TO CONSIDER BEFORE APPLYING

Positions at CoMHWa may involve exposure to sensitive and potentially distressing material, including the personal experiences of others. These roles carry varying degrees of emotional demands and require applicants to have sufficient progression in their own personal recovery to manage these demands appropriately. CoMHWa does provide significant psychosocial supports to staff in managing situations such as access to debriefing, co-reflection, peer supervision, employee assistance program and wellbeing days (for the 2026-2027 financial year).

Applicants should be aware that they may, in the regular course of duties, encounter information or experiences that could be similar to experiences of their own and this may be activating. The capacity to maintain professional boundaries and safeguard personal wellbeing is an inherent requirement of employment at CoMHWa.

QUALIFICATIONS

- Tertiary or vocational qualifications in information technology

ESSENTIAL MINIMUM REQUIREMENTS

- It is a genuine occupational qualification of this position to have a lived experience of mental health/social and emotional wellbeing issues and recovery in accordance with section 66(s)(c) of the Equal Opportunity Act 1984.
 - **Note:** CoMHWa uses a trauma-informed recruitment approach. You will not be asked to disclose personal details of your experiences. A simple self-declaration will be used to confirm eligibility, with optional opportunities to reflect on how lived experience informs leadership practice.
- Demonstrated experience working with a customer relationship management (CRM) system; experience with SugarCRM highly desirable.
- Experience in system testing, including documenting test scenarios, outcomes and issues.
- Ability to prepare clear user guides, procedural documents and training materials.
- Experience delivering training or providing user support in a systems or business application environment.
- Excellent interpersonal, written and verbal communication skills with a strong team orientation and consumer focus.
- Demonstrated capacity to work as part of a team to deliver outcomes.
- Ability to work autonomously and use initiative to meet required outcomes.
- Demonstrated ability to use technology platforms including the Microsoft suite of office products.

DESIRABLE

- Experience in working with people across a diversity of backgrounds.
- Understanding of the not-for-profit sector.

CoMHWa welcomes applications from people across a diversity of backgrounds (e.g. culture, ability, gender/sexuality, age) and from people with additional life experiences relevant to mental health (e.g. experiences of homelessness or overcoming substance use challenges).

APPOINTMENT FACTORS / PREREQUISITES:

- Current Western Australian Drivers Licence;
- National Police Certificate;
- Working with Children Check;
- Certification of qualifications (if applicable)

POSITION TYPE / REMUNERATION

POSITION TYPE AND TERM

Position type: Fixed Term
Position term: To 30th June 2027

A full-time equivalent position (1.0 FTE) at CoMHWa is seventy-five (75) hours per fortnight.

FTE for this position:	1.0 FTE
Hours per fortnight:	75 hours per fortnight

REMUNERATION

Salary: \$97,211 – \$101,304
Superannuation As per legislative requirements

- * Salary packaging / sacrifice is available on approval from the Chief Executive Officer. CoMHWa is classified as a Health Promotion Charity by the Australian Taxation Office. Fringe Benefits Tax exempt salary sacrifice is available on approval from the Executive Director to a maximum of \$30,000 grossed up per annum.

Please refer to the Australian Taxation Office website <http://www.ato.gov.au/nonprofit> and follow the links for further information.