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POSITION TITLE: CRM & Data Administration Officer

REPORTS TO : Chief Operating Officer

PERIOD OF APPOINTMENT: Permanent Ongoing

HOURS OF EMPLOYMENT: Permanent Part-Time (60 hours a fortnight)

Extended Families aims to provide a flexible and family-friendly environment for staff. Start and finish times are flexible and can be negotiated.

CLASSIFICATION LEVEL: Level 3 of the SCHADS Award

LOCATION: The position will be based at our Box-Hill office. Work from home by negotiation.

ORGANISATIONAL CONTEXT:

Extended Families Australia facilitates positive connections between people within the community to provide support people with disabilities and their families. Extended Families seeks to widen social networks, empower individuals, promote inclusion, and strengthen the bonds people have within their local area. The organisation breaks down barriers by changing social attitudes and creating opportunities.

People with disabilities and their families who are supported by Extended Families have access to several flexible support options including support worker matching for social, recreational and respite support; support coordination; supported play groups; capacity building peer groups; and financial plan management.

The programs offered by Extended Families are largely funded by the NDIS. The NDIS is a way to provide support for Australians with a disability, their families, and carers. This scheme aims to maximise choice and control for participants and increase social and economic participation for people with a disability. Under this scheme, participants receive a plan with the goals they want to achieve within a given timeframe and budget allocated to them by the NDIA.

ORGANISATIONAL RELATIONSHIPS:

Reports to: Directly report to the Chief Operating Officer and ultimately to Extended Families' CEO

Direct Reports: NIL

Internal Relationships: The position will work closely with the Chief Operations officer and will work with staff across the whole organisation

External Relationships: CRM Vendors and Software Providers

Consultants and Data Integration Partners

POSITION PURPOSE:

The CRM & Data Administration Officer is responsible for maintaining, enhancing, and protecting the organisation's CRM and related data systems. This role ensures the integrity of client and stakeholder data, supports payroll and billing functions, and provides general administrative assistance to various teams. You will work closely with all departments — including LinC and Finance — to manage participant records, service agreements, billing accuracy, and CRM configurations. The position plays a critical role in enabling accurate reporting, automation, and data-driven decision-making.

KEY RESPONSIBILITIES:

- Manage and maintain accurate CRM records, ensuring data completeness and quality.
- Configure the CRM to meet operational needs across departments.
- Identify and remove duplicate, incomplete, or inconsistent records.
- Validate data using Excel, Power Query, or SQL scripts.
- Develop and enforce automated validation rules to reduce data entry errors.
- Build and maintain CRM reports and dashboards to support business insights.
- Support user training and assist staff with CRM troubleshooting.
- Manage CRM support tickets and liaise with providers.
- Maintain the overall health, security, and performance of the Salesforce platform (including Lumary and Skedulo).
- Monitor NDIS plan updates and funding changes on the NDIS portal.
- Set up and maintain service agreements, ensuring timely filing of signed copies
- Generate CRM reports to verify billing and data accuracy.
- Support LinC service facilitators in entering non-face-to-face billing in a timely manner.
- Work closely with the LinC Team Leader and Finance Team to resolve payroll queries.
- Liaise with support workers regarding billed shifts and timesheets.
- Contribute to fortnightly payroll processing by ensuring all CRM data aligns with payroll requirements.

KEY SELECTION CRITERIA

Mandatory

- Bachelor's degree (or equivalent) in Information Systems, Computer Science, Business Analytics, Data Management or related discipline
- 2+ years experience in a CRM/Database administration role
- Experienced with CRM platforms and rostering systems (salesforce, Lumary and Skedulo an advantage)
- Experience with CRM administration & configuration, SQL / database knowledge, Integration / APIs
- Strong experience in data management
- Experience with data cleaning, validation, deduplication, and quality control
- Ability to build reports, dashboards in CRM (Power BI, Tableau, native CRM)
- Troubleshooting, resolving user issues, managing system changes

Highly desirable

- Understanding of the NDIS and its pricing arrangements or experience in the disability/community services sector will be highly regarded
- Familiarity with automation tools (Power Automate, Zapier, etc.)
- Project management experience

ADDITIONAL INFORMATION

Equal Opportunity

Extended Families Australia is an equal opportunity employer.

Inclusion and Diversity

Extended Families welcomes the rich diversity of our community and strives to be inclusive for all. As an equal opportunity employer, we promote social inclusion and encourage applications from people with disabilities, Aboriginal and Torres Strait Islander people, those from all cultural backgrounds, and people from the LGBTIQ+ community.

Extended Families wholeheartedly commits to creating a culturally safe environment that honours and empowers Aboriginal and Torres Strait Islander children and adults, actively opposes racism, and ensures their full participation and well-being within our organisation. We acknowledge Aboriginal and Torres Strait Islander peoples as the first inhabitants of this nation and the Traditional Custodians of the lands where we live, learn and work.

Child Safety

Extended Families is committed to ensuring the safety, wellbeing, and empowerment of all children. Discrimination is not tolerated, and we treat every child with dignity and respect.

Zero Tolerance

Extended Families maintains a zero-tolerance policy against abuse directed at people with disabilities. Our commitment is reflected by taking proactive measures to empower all staff with the skills to identify, prevent, and respond to all forms of abuse, neglect, and harm.

Date created	14/10/2025
Approved by	Graeme West, CEO
Date of Approval	14/10/2025

I have read, understood and accept the above position description. I acknowledge that the statements included in this position description are intended to reflect duties and responsibilities that I may be required to undertake and are not to be interpreted as being all inclusive			
Name	(Print)		
Signature		Date	