



Chartered  
Institute of  
Taxation.

# SharePoint & Data Administrator (SDA)

Role Information Pack  
April 2026

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# Welcome

Thank you for showing interest in the SharePoint Data Administrator role. The CIOT and ATT are educational charities and the leading professional bodies in the UK for tax advisers and tax technicians dealing with all aspects of taxation. If successful, you will be joining a dedicated team of staff and volunteers who ensure that we continue to meet our primary purpose of promoting education in taxation. Our key aim is to achieve a more efficient and less complex tax system for all, and you will see from our annual reports that we do this through a wide range of activities.

At the CIOT and ATT our vision is: to remain the leading bodies for taxation professionals in the United Kingdom, serving the public interest through the pursuit of excellence and with integrity, and we're looking for people who are excited about joining us on our journey. To help us achieve our vision we're looking for exceptional people who live our values and behaviours and who can inspire others; embrace change; deliver results and keep it simple.

We live by our values which are:

**Ethical** - We act with integrity, promoting high ethical standards and accepting accountability for our actions.

**Collaborative** - We value working constructively with stakeholders to achieve our goals.

**Inclusive** - We welcome, respect, and value everyone and actively consider how to be accessible.

**Empowering** - We encourage and enable personal growth and seize opportunities.

**Progressive** - We are future focused; constantly learning and driving improvements that deliver enhanced service excellence.

**Committed** - We are focused on and dedicated to the consistent delivery of our charitable objectives and services.

We know that an inclusive environment makes us more accessible and ensures we attract, engage, promote, and retain exceptional people. We welcome applications from all individuals regardless of age, gender/gender identity, sexual orientation, ethnicity/nationality, disability, or military service and welcome those who have taken career breaks. We will consider flexible working arrangements or home working arrangements for any of our roles and offer workplace accommodations to ensure you have what you need to effectively deliver in your role.

We're organisations which were founded by ordinary people who were dedicated to making tax as simple as possible for the public and providing qualifications that are open to all. Our members and volunteers come together to help each other get the most from their Professional Bodies and enhance their future careers. If you come to work here at the ATT & CIOT, you'll be part of that. Part of something a bit different. And something really quite special.

What's more, we have a strong ethic of care for each other and our members. We recognise that our employees feel most appreciated when their thoughts and values are respected and considered. We're committed to creating a culture that recognises and truly values our individual differences and identities. So, if you'd like to be a part of an inclusive workplace where you can be yourself, where your talents are nurtured, and you feel empowered to contribute, then please apply.



Jane Ashton  
ATT CEO



Helen Whiteman  
Chief Executive, CIOT

## The Organisation (CIOT/ATT)

The CIOT is the leading body in the UK for taxation professionals dealing with all aspects of taxation. Our primary purpose is to promote education in taxation. One of our key aims is to achieve a more efficient and less complex tax system for all. Our comments and recommendations on tax issues are made solely in order to achieve this aim; we are an entirely apolitical organisation. Membership of the CIOT is by examination, nationally recognised as the gold standard of UK taxation education. We support our 19,000 members and 5,000 students throughout their tax careers, providing assistance through our London-based head office and worldwide network of 40 branches. The CIOT is a registered charity, number 1037771 and a regulatory body for the purposes of Anti-Money Laundering supervision of tax practitioners.

The CIOT is managed by its chief executive and directors, under the strategic guidance of the Council. The CIOT is a company established under Royal Charter. Its governing documents comprise the Charter, Byelaws, Member Regulations and Council Regulations. The CIOT does not raise funds through asking for public donations in any form.

The primary charitable objective of the ATT is to promote education and the study of tax administration and practice. One of our key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Drawing on our members' practical experience and knowledge, we contribute to consultations on the development of the UK tax system and seek to ensure that, for the general public, it is workable and as fair as possible. Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is constantly kept up to date. Members may be found in private practice, commerce and industry, government, and academia.

We are delighted to announce that we have been awarded the People Insight Outstanding Workplace 2025 award for the third-year running!

We are very proud that our continued efforts to engage our employees and create a healthy workplace culture have paid off. This is real testament to the supportive and engaging environment we foster for our staff.

**Outstanding  
Workplace 2025**  
3 time winner



# Role description

## Job purpose

This role will be responsible for managing and optimising our SharePoint and CRM environment and data, which are used as a platform for business processes, document management, intranet, and collaboration.

The SDA will coordinate with the DPO to ensure that the organisation complies with data guidelines.

The SDA will design, develop, and maintain the SharePoint sites, libraries, lists, workflows, and web parts, and ensure that they meet the needs and expectations of the users.

They will also be a back-up service and report to the CRM Business Process & Education Data Manager.

The SDA will also provide technical support and training to all users and troubleshoot any issues or problems.

## Operating Environment

The CIOT and ATT have a wide range of stakeholders within their operating environment, including full-time and part-time permanent staff, volunteers, members, students, and several external stakeholders.

The role operates within the IT Services Team, which is part of the Operations Directorate led by the CEO, and works alongside the Membership Services Team, Business Development & Marketing Team, and People Team to deliver business operations for the whole organisation.

The IT Services Team contains specialist staff delivering core outputs that are both external facing and internal key enablers.

## Framework & Boundaries

As general guidance, the following framework, and boundaries are expected of the role:

- The role is responsible for services jointly delivered to CIOT and ATT.
- The role is responsible for improving the quality and efficiency of our SharePoint, CRM and Data.
- CRM administration: Coordinate with the CRM Business Process & Education Data Manager to ensure the Dynamics CRM processes, data structures and workflows are maintained, supported and aligned with organisational requirements.
- Compliance Monitoring: coordinate with the DPO to ensure that the organisation complies with GDPR and other relevant data protection laws.
- Policy Development: coordinate with the DPO to develop and implement data protection policies and procedures.
- Incident Response: Manage and respond to data breaches and other data protection incidents.
- Communication: Serve as the point of contact for data protection authorities and data subjects.

# Key Accountabilities

- **System Management:** Administer and maintain SharePoint and CRM systems, ensuring they are up-to-date, secure, and performing optimally.
- **User Support:** Provide technical support and training to users, helping them effectively utilise SharePoint and CRM functionalities.
- **Data Management:** Oversee data integrity and security within both systems, ensuring compliance with relevant regulations and policies.
- **Customisation and Integration:** Customise SharePoint and CRM to meet the specific needs of the organisation and integrate them with other business applications.
- **Collaboration Enhancement:** Facilitate collaboration by managing document libraries, workflows, and communication tools within SharePoint, and by optimising CRM for customer interactions and sales processes.
- **Reporting and Analytics:** Generate reports and dashboards to provide insights into system usage, customer interactions, and business performance.

# Job impact (desired impact of this role)

- **Enhanced Productivity:** By ensuring that SharePoint and CRM systems are running smoothly, the administrator helps improve overall productivity and efficiency within the organisation.
- **Improved Collaboration:** Facilitates better collaboration and information sharing among team members, leading to more effective project management and customer relationship management.
- **Regulatory Compliance:** Ensures the organisation adheres to data protection laws, best practice and avoids legal penalties.
- **Risk Mitigation:** Identifies and mitigates data protection risks, protecting the organisation's reputation.
- **Data-Driven Decisions:** Provides valuable insights through reporting and analytics, enabling informed decision-making and strategic planning.

# Skills Needed to Fulfil the Role

## Knowledge and experience

- **Technical Proficiency:** Strong knowledge and experience of SharePoint and Dynamics CRM platforms, including configuration, customisation, and integration.
- **Problem-Solving:** Excellent troubleshooting skills to resolve technical issues and improve system performance.
- **Communication:** Effective communication skills to train users and collaborate with other IT and business teams.
- **Project Management:** Ability to manage projects related to system upgrades, migrations, and new implementations.
- **Security Awareness:** Understanding data security principles and practices to protect sensitive information.

## Functional/technical skills

- **Database Management:** Knowledge of database management and SQL for querying and managing data.
- **API Integration:** Experience with API integration to connect SharePoint and CRM systems with other applications.
- **Proven experience in data protection and compliance roles.**
- **Analytical Skills:** Strong analytical and problem-solving skills.
- **Communication:** Excellent communication and interpersonal skills.

## Interpersonal and work management skills

- **Commitment to quality, customer service, best practice, and best value in all aspects of the Institute's operations.**
- **Evidenced commitment to equality, diversity and inclusion through service provision.**
- **Results-focused attitude.**
- **Reliable and trustworthy.**

# Salary & Benefits Package

## Salary

The salary for this role is £50,000 per annum, 35 hours per week (remote) with occasional visits to the office as and when required.

## Pension

You will be automatically enrolled into the Aviva Group Pension Plan (10% employer and 3% employee contribution) upon joining.

## Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/ loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

## Holiday entitlement

The organisation offers a generous holiday entitlement from 25 - 30 days depending on your length of service, and pro-rated based on your working pattern.

## Optional Benefits

### Bupa (private medical insurance)

You can join our company paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

### Healthshield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy, etc.) and an employee helpline covering medical and legal issues and counselling.

### Interest Free Loans

After 6 months' service you may apply for an interest free-loan to help with the purchase of a season ticket or a bicycle.

### Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.



# Guidance Notes for Applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact Sharon Jepson [sjepson@ciot.org.uk](mailto:sjepson@ciot.org.uk) for advice.

The deadline for applications is 26 May 2026 by 5pm.

You can apply by submitting a covering letter and up to date CV via email to Sharon Jepson as per the email address provided above. Your covering letter should make it clear how your skills and experience match those described in the advert or job description.

If you wish to find out more about the role before applying, you may do so by emailing Sharon or by calling HR on 02073400563. This will not prejudice your application in any way.

If you do not hear from us within 2 weeks of applying this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised. This post will be resourced through a

two-stage interview process. 1<sup>st</sup> stage will be online w/c 1 June and 2<sup>nd</sup> stage will be online w/c 8 June.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email. If you do not do so we will assume you are no longer interested. If there is to be a presentation or test you will be informed of this in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application.



