

Job Title: Database Donor Relations Associate
Department: Advancement

Status: Full Time / Exempt
Reports To: Director of Development

SUMMARY

Reporting to the Director of Development, the Data and Donor Relations Associate provides overall management and accountability for donor-related data, documentation, tracking, and oversight of database including accuracy, timeliness and management of donor records, acknowledgements, and donations. Assists with donor research. Responsible for defining, maintaining and promoting best practices for data input, clean-up, and overall records management. This position will also be an integral part of various fundraising and annual campaign efforts and is a crucial team member of the Advancement Team and the team's ability to reach annual fundraising goals.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Manage data entry and donor records, ensuring accuracy, timeliness, and consistency for inputting data into donor software system, Raiser's Edge
- Serve as institutional liaison with Advancement's Customer Relationship Management (CRM) platform (Raiser's Edge/ BlackBaud)
- Responsible for collecting, monitoring and accurately entering various financial donation-related data into CRM
- Accountable for financial gift acknowledgements, tax receipts, and online credit card donations and reporting including merchant services relationship, audit controls and periodic reconciliation processes with Director of Development and/or Finance Department
- Produce thank you letters in a timely manner and manage personalization from appropriate gift officers, VPs, Board members and/or CEO
- Manage third-party platform gift reconciliation
- Respond to donor inquiries concerning gift history, receipts and other documentation
- Provide maintenance of donor database and execute address/mail clean-up protocols including National Change of Address (NCOA) procedures on a quarterly basis
- Assist in donor prospect research
- Identify, mine and analyze prospects for fundraising and outreach initiatives
- Provide staff training, support and feedback on data entry and reporting for all database users, as appropriate
- Develop and maintain queries/exports for direct appeals, email campaigns and ad hoc projects
- Update donor wealth screenings and other fundraising-related data
- Support team execution of various other components and activities of annual campaign and track related updates on all appeals in CRM
- Lead CIS in community engagements such as workplace giving United Way campaigns, fairs, etc. as needed
- Provide departmental administrative support, may include documenting donor notes and other sensitive/confidential information
- Provide Advancement Department and overall agency with additional support toward organizational goals as needed

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

EDUCATION, EXPERIENCE & SKILLS

- Associate's Degree in fields related to Donor/client relationship management, Business, IT, Finance, Marketing and/or other related area. Bachelor's degree preferred
- Minimum of two (2) years of database management experience in a nonprofit fundraising, marketing or data processing environment
- Systems experience with data import/export, queries and designing and generating reports
- Experience utilizing Raiser's Edge donor software is a plus
- Demonstrated computer proficiency in Microsoft Word, Excel and PowerPoint and experience with Google Suite, Zoom and other virtual meeting platforms
- Must be self-motivated, well organized, detail oriented, and able to effectively work independently and within a team framework
- Must be decisive and responsive to all stakeholders
- Must have an exceptional ability to build and maintain relationships and foster a spirit of collaboration with internal colleagues and external donors, partners, Board members, and volunteers
- Sensitivity and ability to appreciate points of view of personnel within the schools, other agencies/organizations, diverse donors or constituencies, and volunteers, including a keen awareness of their needs and goals and how to build collaborative support
- Ability to perceive CIS project needs and proactively contribute to execution and end goals
- Ability to be flexible and adaptable in a work environment often filled with ambiguous situations
- Strong verbal, written and interpersonal communication skills
- Ability to work a flexible schedule
- Demonstrated ability to balance accountability with emotional intelligence when interacting with staff at all levels; must demonstrate sensitivity with staff representing all areas of diversity

PHYSICAL DEMANDS

While performing the duties of this job, the employee is frequently required to sit; use hands to handle, feel and keyboard; reach with hands and arms; and talk or hear. The employee is occasionally required to stand; walk; stoop, kneel, or bend. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close and distance vision.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

WORK ENVIRONMENT

The position is located within the Charlotte Mecklenburg area. Regular and satisfactory attendance and punctuality are required. Regular and satisfactory performance including meeting all process deadlines and stated deliverables is required.

The statements contained herein describe the scope of the responsibility and essential functions of this position but should not be considered to be an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other areas to cover absences or relief to equalize peak work periods or otherwise balance the workload. Other duties may be assigned.

Criminal background check and pre-employment drug test required. Financial credit check and driving record check required, if applicable.