



POSITION DESCRIPTION

| Database System & Constituent Relationship Management (CRM) Manager | |
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| Department: Advancement | Status: Regular Full-time, Exempt |
| Reports to: Director of Advancement | Last Reviewed: October 2024 |
| Titles reporting to this role: Advancement Associate | Next Review Date: |

Position Summary:

The Database System and CRM Manager is responsible for managing Casa Central's fundraising database and CRM system (Raiser's Edge), ensuring effective data management, constituent relations and targeted communications. This highly analytical and motivated individual serves in a leadership role in database administration by reorganizing several auxiliary systems, including donor relations, donation processing, stewardship, wealth screening, prospect research, and reconciliation. This position is pivotal in shaping the data infrastructure that supports Casa Central's mission and strategic fundraising efforts.

Reporting to the Director of Advancement, the Database System and CRM Manager supervises the Advancement Associate and is responsible for the configuration, management and maintenance of the database. This role manages the data alignment tasks in the current CRM (Raiser's Edge) and customization of processes and procedures. This role collaborates closely with the Advancement, Finance, Operations, Programs, and Marketing teams to ensure seamless integration and data flow across functions. Additionally, this position will help define and implement database systems that can support our relationships with key stakeholders.

Essential Duties and Responsibilities

Include the following, other duties as assigned:

Database Management

Responsible for shaping the design, customization, and configuration of the Raiser's Edge CRM to maximize optimal fundraising and communication outcomes by developing and maintaining internal policies, procedures and best practices. Responsible for the management of the agency's donor database along with integrated platforms. Leads the training of new and existing staff in Raiser's Edge. Supervises Advancement Associate and oversees gift entry and ensuring accuracy in the process. Assists with the processing of more complex gifts like stock gifts and gifts-in-kind, as needed. Ensures that the various operational needs of the Advancement Department are met to support its fundraising efforts.

Database Governance

Foster solutions and collaboration among all members of the Advancement Team, contributing to key business decisions. This includes defining and documenting process flows and establishing consistent terms related to gifts, campaigns, appeals, and audience segments. Ensures that the donor database is effectively administered and overseen, with a focus on accurate data coding, entry, and updates in line with established protocols. Key focus is on the continuous enrichment of

CRM data, which involves performing regular address updates, capturing wealth screening data, and managing other data hygiene efforts to maintain data quality and integrity of the information. The role also involves defining and documenting database fields and attributes, ensuring clarity and consistency across the organization. Develops and maintains internal policies, procedures, and quality assurance protocols that ensure effective and consistent database management practices throughout the organization. Manage access for staff by assigning user accounts, and setting appropriate permission levels to safeguard the CRM system. In addition, oversees data imports and updates, providing data entry support as needed.

Integration & Analysis

Responsible for recommending and overseeing the structure of the current CRM system, Raiser's Edge, ensuring it adapts to the evolving needs of the organization. Works closely with the Advancement Department to create both customized and standard queries and reports, which are consistently run to analyze donor trends, campaign performance and provide insights that meet the organization's reporting requirements. Conducts research to analyze donor and campaign data, offering guidance on metrics for tracking overall giving. Ensures that key performance indicators are identified, monitored, and aligned with the organization's fundraising goals. The individual stays informed on giving trends and shares relevant information with staff and volunteers to align efforts with the industry's best practices. Collaboratively with the Marketing and Communications Manager, supports and analyzes communication campaigns, contributing to solutions that enhance audience segmentation and improve targeting. The position also assists with the organization's technological needs as required, ensuring efficient operations across departments.

Ensure Data Integrity

Responsible for maintaining the integrity of data across the organization. This includes conducting regular system checks and audits to ensure data accuracy and consistency. A key responsibility involves managing vendor relationships, which includes tracking contract renewals, identifying relevant training opportunities, and submitting complex support tickets to vendors as needed. Ensures that timely acknowledgments are sent to donors while also responding to special donor requests. Oversee the entire process for receiving gifts, pledges, and pledge payments, ensuring that acknowledgments are handled efficiently and accurately. Contributes to reconciliation efforts by working closely with the Finance Department to ensure data synchronization across multiple systems. Flexibility in supporting various other tasks and duties as assigned, helping the organization adapt to evolving needs.

Gift Entry, Acknowledgement & Reconciliation

Manage relationships with external vendors responsible for gift administration, ensuring the timely and accurate import of data. Oversee the acknowledgment process to guarantee that donors receive personalized acknowledgments and tax receipts in a timely manner. Collaborate with the finance department to ensure smooth month-end and year-end reconciliation, facilitating the seamless transfer of donation data. Produce donor pledge reminders and invoices, and handle donation-related inquiries with a strong focus on providing exceptional donor support.

Moves Management

Manage the system that tracks the process of moving potential donors through various stages, from initial engagement to making a gift and stewardship. Regularly monitor donor interactions, track progress within the moves cycle and update donor status in the Raiser's Edge system. Work with Advancement team to coordinate moves, ensuring that team members are aligned on messaging

and strategy for each donor. Analyze donor data to identify trends, determine appropriate moves for each donor segment, and make data-driven decisions to guide next steps. Work with Advancement team to plan and execute cultivation and stewardship activities, such as events, personalized communications, and touchpoints, to strengthen donor relationships. Conduct ongoing research to learn more about prospective and current donors, including their interests, giving history, and capacity and record in Raiser's Edge system. Prepare regular reports on progress toward fundraising goals, providing insights on pipeline activity.

Stewardship Management

Develop and manage tracking processes for donor acknowledgments, recognition, and ongoing communication, with the goal of strengthening donor relationships. Design and implement stewardship systems that foster personalized engagement with donors, volunteers, and in-kind supporters. Ensure high-level donors receive tailored communications, impact reports, and personalized experiences. Draft thank-you letters, newsletters, and impact reports for donors and volunteers, while providing stewardship metrics to support the Advancement team's efforts.

Systems Administration and Support

Manage the organization's online giving platforms, ensuring efficient implementation of campaigns and accurate reporting. Collaborate with various departments to develop efficient data-sharing systems while maintaining strict donor confidentiality. Provide ongoing training for development staff on database processes and ensure the team is up-to-date on Raiser's Edge updates and best practices.

General Requirements:

Sensitivity to cultural diversity is required. Will be subject to pre-employment screening that includes a medical, lift, and drug and alcohol screening, as well as aptitude and skills testing, where applicable.

Education/Experience:

Bachelors in Business Administration or another related field. Minimum of two years of experience in fundraising database management or administration required. Prior Experience with Blackbaud Raiser's Edge/NXT, or CRM software programs required. Proficiency in Microsoft Office (Teams, SharePoint, Word, Excel, PowerPoint) required.

Language Skills:

Bilingual Spanish preferred.

Computer Literacy & Knowledge Skills Abilities:

Must be computer literate and proficient in Microsoft Office 365 and suite. Clear understanding of CRM platforms. Ability to work with Microsoft Teams. Ability to multitask and prioritize. Strong verbal and written communication skills. Ability to work independently and with a team. Ability to use good judgement when making independent decisions, with excellent attention to detail. Able to meet specific deadlines and juggle multiple priorities. Ability to meet deadlines while managing multiple projects. Excellent interpersonal skills.

Mathematical Skills:

Basic skills needed to work with fiscal matters, budgets, and expense reports.

Operating Environment and Working Relationships:

Is an integral member of the Advancement Team involved in fundraising efforts, stewardship of donors and agency supporters, and developing and disseminating information about agency work

to outside audiences. Works collaboratively and routinely with all Casa Central Programs and departments.

Decision Making Authority:

Exercises discretion, independent judgment in executing tasks.

Remote Work/Technology (WIFI)/Mobile Phone Usage:

Eligible for remote work and requires the use of a personal mobile phone. Reference Casa Central's Flexible Work Arrangement Policy for reimbursement information.

Physical Demands:

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. While performing the duties of this job, the employee is regularly required to sit, talk, and listen. The employee frequently is required to use hands. Must be able to lift and carry up to 25lbs.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

Disclaimer:

The statements herein are intended to describe the general nature and level of work being performed by the employee in this position. The content of this job description is not intended to be constructed as an exhaustive list of all responsibilities, duties, and skills required of a person in this position.

I acknowledge and understand that:

Receipt of the position description does not imply nor create a promise of employment, nor an employment contract of any kind, and that my employment is at-will.

- The job description provides a general summary of the position in which I am employed, that the contents of this job description are job requirements, and, at this time, I know of no limitations which would prevent me from performing these functions with or without accommodation. I further understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these functions.
- Job duties, tasks, work hours and work requirements may be changed at any time.

Employee Signature/ Firma de Empleado: _____

Date/ Fecha: _____

