



CRM DATABASE COORDINATOR POSITION DESCRIPTION

EFFECTIVE DATE:	<u>10/4/17</u>	FTE STATUS:	<u>1.0 (Full-time)</u>
DIVISION:	<u>Institutional Advancement</u>	FLSA CLASS:	<u>Non-Exempt</u>
DEPARTMENT:	<u>Development</u>	SUPERVISES:	<u>Database Volunteers</u>
REPORTS TO:	<u>Annual Giving & Membership Manager</u>	DRIVING CLASS:	<u>Preferred</u>

GENERAL SUMMARY:

The CRM Database Coordinator oversees the maintenance and administration of America's Automotive Trust (ATT) and its affiliates' customer relationship management (CRM) database system, including coordination of updates, data input, data maintenance, and training for end-users across all departments within ATT, America's Car Museum (ACM) and the RPM (Restoration Perseveration Mentorship) Foundation (RPM). This position also oversees the database fulfillment portion of the membership enrollment process, sends acknowledgments for all gifts and donations received, ensures that timely gift and membership data is communicated to the Institutional Advancement team, prepares prospect giving reports for major gift development committees and provides Development statistics reports to the CEO and for Board meetings.

The CRM Database Coordinator is part of the Institutional Advancement (IA) Team and is supervised by the Annual Giving & Membership Manager. Responsibilities include, but are not limited to: Providing oversight of data management, quality control and data structure within the CRM database system; Training and coordinating training for end-users; Overseeing data enrichment and the cleansing of data moving in and out of the CRM system; Troubleshooting and resolving database problems, issues and concerns; Creating queries and running high quality reports for data consumers throughout America's Automotive Trust (AAT) and its affiliates; Serving as the liaison between Blackbaud and AAT and its affiliates; Interfacing with administration to ensure successful delivery of information in a supportive role; Assisting with the fulfillment portion of the membership enrollment process and processing membership cards; Sending gift acknowledgements, pledge reminders and tax receipts; Conducting donor prospect research; Creating prospect research profiles; Assisting with gift fulfillment; and, Assisting the IA department with various administrative tasks.

This position description has been designed to indicate the general nature and level of work performed by jobholders within this role. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to the job. To perform the job successfully, an employee must perform each essential responsibility satisfactorily. These requirements are representative, but not all-inclusive, of the knowledge, skills, and abilities required for this position. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

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PRIMARY OBJECTIVES:

1. Serve as the internal CRM database system subject matter expert and provide support for end-users, particularly the Development Department, within AAT and its affiliates to ensure data integrity, accessibility and value;
2. Coordinate donation and membership enrollment processes and streamline data processing, tracking and reporting to ensure acknowledgment activities are recorded, fulfilled and tracked in the Altru CRM system;
3. Ensure Altru CRM database data integrity, accuracy of data enrichment, implementation of database updates, accuracy of data cleansing and efficient extraction of reports to meet the needs of AAT and its affiliates;
4. Ensure all end-users are adequately trained in use of the Altru system to maintain consistency and accuracy of CRM data and reports;
5. Broaden interdepartmental cooperation, use and integration of the Altru data management system to support IA membership and fundraising initiatives.

MAJOR RESPONSIBILITIES:

Under the direction of the Annual Giving & Membership Manager, the CRM Database Coordinator will be responsible for:

1. Completing all CRM tracking responsibilities, including processing of all donations, gift acknowledgements and pledge reminders, and overseeing the proper allocation of gifts and reconciling from Altru to Financial Edge;
2. Developing and coordinating the implementation and utilization of the Altru data management system throughout AAT and its affiliates;
3. Serving AAT and its affiliates as the internal subject matter expert for Altru and support for all end-users, including training, troubleshooting, and creative brainstorming;
4. Providing oversight for data enrichment, quality, structure and cleansing of data moving in and out of the Altru CRM system;
5. Managing a calendar of membership correspondence activities to ensure timely completion of renewal notifications, pledge reminders, thank you letters and tax receipts, etc.;
6. Overseeing the establishment of policies, procedures and best practices in the use of the museum's Altru CRM database system, including overseeing all related cross-departmental training.

QUALIFICATIONS:

The incumbent for this position must be at least 21 years of age and possess: an AA with a minimum of two years development or database experience within a prospect research environment. Experience entering data and creating reports in a relational database is required, preferably Raiser's Edge or Altru. Relevant education or experience may substitute one for another on a year for year basis. The incumbent must be a team player able to work independently and collaboratively among all departments within the Museum.

Additionally, the incumbent must possess:

1. The ability to pass an in-depth background investigation including criminal history, employment and education records and personal references;
2. The ability to be regularly present and available in the office during regular administrative business hours;

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3. A solid proficiency in the English language with professional abilities in oral and interpersonal communications;
4. A solid understanding in database data management and a proficiency in database report creation;
5. Intermediate to advanced skills in M.S. Word, Excel and Outlook;
6. A keen attention to detail with the ability to critically analyze and resolve quantitative and logistical problems;
7. An ability to thrive in a fast-paced, dynamic environment, with high expectations for professional outcomes;
8. A proven ability to multi-task and prioritize competing tasks while meeting deadlines;
9. A willingness to maintain scheduling flexibility for occasional evening and weekend work;
10. The skill and ability to work independently with general instruction and minimal supervision while maintaining a team oriented approach and attitude;
11. The skills and ability to positively and professionally function as part of a team environment and promote teamwork with a positive and solution-focused attitude;
12. The interpersonal skills, sensitivity and ability to professionally interact with a diverse range of people of all ages, socio-economic groups and personality types;
13. The ability to: Work on the computer for extended periods of time; Visually inspect, compare, and analyze written data; Read and interpret instructional material; Communicate clearly in both verbal and written forms; and lift and transport up to 25lbs periodically.

RESPONSIBILITIES:

DATABASE COORDINATION:

1. Serves as the liaison between Blackbaud and AAT and its affiliates;
2. Attends Blackbaud trainings and maintains up-to-date knowledge and technical skills of Altru data management system;
3. Serves AAT and its affiliates as the internal subject matter expert regarding the Altru Museum Management Software and related data management and reporting needs;
4. Oversees the maintenance and administration of the Altru CRM database, including: coordination of updates, data input, data maintenance and coordination with end-users within AAT and its affiliates;
5. Provides for oversight for data integrity, data extraction, report customization and analysis, records management, data enrichment, and cleansing of data for the CRM system;
6. Trains and coordinates trainings provided by Blackbaud for all end users, including training end users to identify needs and opportunities for improved data management and delivery within the Altru system;
7. Interfaces with administration, in a supportive role, to ensure successful delivery of database information;
8. Develops, maintains and teaches data entry protocol to all CRM end users to ensure accuracy of information within the database;
9. Oversees and coordinates the ongoing development and operations of the Altru CRM Software;
10. Improves and streamlines processes regarding data flow and data quality to improve data accuracy and value;
11. Oversees data enrichment and the cleansing of data moving in and out of the CRM system;
12. Troubleshoots CRM database problems, issues and concerns across all departments within the Museum;

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13. Assesses database deficiencies and creates efficient and effective plans to resolve them internally or through working with Blackbaud;
14. Configures and manages E-ticketing within Altru in collaboration with the Digital & Social Media Coordinator;
15. Collaborates with external partners/contractors (e.g., Arscenia, LivePulse, Blackbaud), as needed, for the expansion and maintenance of Altru's use throughout AAT and its affiliates.
16. Streamlines data processing, flow and reporting.

DATA ENTRY AND MEMBERSHIP COORDINATION:

1. Enters AAT's and its affiliates' memberships, donations and pledges into the Altru CRM system;
2. Completes primary donor data input in support of IA membership and fundraising efforts;
3. Acknowledges all monetary and in-kind donations through the prescribed timely process and distributes membership materials and benefits, as needed;
4. Tracks member gifts within Altru and oversees gift processing;
5. Assists in the proper allocation of gifts and memberships including the development and communication of related procedures and training;
6. Performs reconciliation of Altru to Financial Edge;
7. Completes membership fulfillment responsibilities, including creating and sending membership cards and related gifts;
8. Serves as primary contact for addressing member questions, in-person and over the phone;
9. Maintains data entry protocol to ensure accuracy of information and CRM tracking within all departments;
10. Completes primary data input and CRM tracking to support IA campaigns and fundraising needs;
11. Sends donor and member acknowledgment letters as written by the Annual Giving & Membership Manager;
12. Addresses donor questions in a timely manner;
13. Assists with and participates in phone campaigns to obtain membership renewals, including the training and oversight of staff and volunteer callers;
14. Works in partnership with the Finance Department in the reconciliation of contributed development revenue discrepancies.

ADMINISTRATIVE:

1. Acknowledges all new donors and members within 48 hours;
2. Creates accurate reports in support of cross departmental data needs and the IA Department's fundraising efforts;
3. Provides implementation support for annual appeals and the annual development plan;
4. Orders and maintains supplies for membership fulfillment, including: membership gifts, membership card supplies, letterhead, envelopes and card holders;
5. Performs data mining for prospect research;

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6. Organizes and maintains individual, corporate and foundation prospect filing system within the IA Department;
7. Maintains the filing system of all donor contributions for backup support ;
8. Provides auditors with pledge and in-kind back-up, as needed;
9. Supports IA in cross departmental events with invitation support, RSVP systems, Auction items and other related administrative tasks;
10. Performs other general administrative support duties, including: fulfillment of data requests, mailings, filing, word processing, spreadsheets, presentation graphics, preparing correspondence, photocopying, collating, binding, faxing, scheduling meetings, travel arrangements, etc.;
11. Compiles and submits donor information for the annual report.

DATABASE UTILIZATION:

1. Completes the updating of AAT and its affiliates' member information and entering of new members into the CRM system;
2. Enters email addresses into the CRM database, exports monthly email subscriber list and submits exported list to Digital & Social Media Coordinator;
3. Oversees the exporting of email sign-ups from AAT and its affiliates' website and uploads to Altru;
4. Exports email addresses from the CRM database for use within MailChimp;
5. Uses database to coordinate, process and ensure accuracy of mailings, including: event invitations, broadcast emails and other correspondence;
6. Generates, processes and emails/ mails correspondence and reminder letters to members with expiring memberships;
7. Identifies donors who have made pledges and generates pledge reminders;
8. Generates grant reports and aggregate data to support grant efforts.

ANNUAL GIVING SUPPORT:

1. Under the direction of the Annual Giving & Membership Manager, prints and distributes appeals, solicitations and reminder materials and letters;
2. Assists with direct mail solicitations, online giving and annual gift campaigns;
3. Assists in the cultivation of mid-level donors through acknowledgement, fulfillment, appeals and other collaborative retention initiatives;
4. Coordinates all mail and email distributions to obtain annual gifts, including the training and oversight of staff and volunteer callers;
5. Keeps up-to-date with trends, benchmarking, best practice, professional standards, regulations and new concepts and ideas within the field of CRM Administration.

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OTHER:

1. Assists with gift fulfillment and membership events as directed;
2. Communicates in a friendly, professional and helpful manner with all employees, board members, guests and external contacts;
3. Maintains professional boundaries and behavior, including a positive, collaborative, solution focused and team-oriented attitude;
4. Utilizes MS-Word, Excel and Altru to generate communications and reports;
5. Utilizes MS-Outlook for email communications and scheduling;
6. Maintains the flexibility to accommodate occasional evening and weekend work, as needed;
7. Participates in continuing educational opportunities for professional growth and development;
8. Completes various administrative duties in support of the Institutional Advancement Department and organizational objectives of the museum;
9. Performs additional duties and supportive tasks as assigned, or as needed.

Printed Name

Signature

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