AMERICA'S AUTOMOTIVE *Trust*

CRM DATABASE COORDINATOR POSITION DESCRIPTION

EFFECTIVE DATE:	**6/4/22**	**FTE STATUS:**	**1.0 (Full-time)**
DIVISION:	**Institutional Advancement**	**FLSA CLASS:**	**Non-Exempt**
DEPARTMENT:	**Development**	**SUPERVISES:**	**Database Volunteers**
REPORTS TO:	**Membership Development Manager**	**DRIVING CLASS:**	**Preferred**

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), the RPM (Restoration Perseveration Mentorship) Foundation (RPM), and America On Wheels (AOW). 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 Membership Development 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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Initials   Date

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:

1. Complete 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. Develop and coordinate the implementation and utilization of the Altru data management system throughout AAT and its affiliates;

3. Serve AAT and its affiliates as the internal subject matter expert for Altru and support for all end-users, including training, troubleshooting, and creative brainstorming; and as the liaison between Blackbaud and AAT and its affiliates;

4. Train and coordinate 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;

5. Manage a calendar of membership correspondence activities to ensure timely completion of renewal notifications, pledge reminders, thank you letters and tax receipts, etc.;

6. Improve and streamline processes regarding data flow and data quality to improve data accuracy and value;

7. Assess database deficiencies and create efficient and effective plans to resolve them internally or through working with Blackbaud;

8. Provide for oversight for data integrity, data extraction, report customization and analysis, records management, data enrichment, and cleansing of data for the CRM system;

9. Configure and manage E-ticketing within Altru in collaboration with the Digital & Social Media Coordinator;

10. Oversee 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;

11. Collaborate with external partners/contractors (e.g., Arscentia, LivePulse, Blackbaud), as needed, for the expansion and maintenance of Altru's use throughout AAT and its affiliates;

12. Oversee 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;

13. Attend Blackbaud trainings and maintains up-to-date knowledge and technical skills of Altru data management system.

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Initials   Date

QUALIFICATIONS:

The incumbent for this position must be at least 21 years of age and possess: an AA degree 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;

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 e2xtended 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:

DATA ENTRY AND MEMBERSHIP COORDINATION:

1. Enter AAT's and its affiliates' memberships, donations, and pledges into the Altru CRM system;

2. Assist in the proper allocation of gifts and memberships including the development and communication of related procedures and training;

3. Perform reconciliation of Altru to Financial Edge;

4. Complete membership fulfillment responsibilities, including creating and sending membership cards and related gifts;

5. Serve as primary contact for addressing member questions, in-person and over the phone, and address donor questions in a timely manner, and acknowledge all new donors and members within 48 hours

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Initials   Date

6. Assist with and participate in phone campaigns to obtain membership renewals, including the training and oversight of staff and volunteer callers;

7. Work in partnership with the Finance Department in the reconciliation of contributed development revenue discrepancies;

8. Export email addresses from the CRM database for use within MailChimp;

9. Use database to coordinate, process and ensure accuracy of mailings, including event invitations, broadcast emails and other correspondence;

10. Generate, processes and emails/mails correspondence and reminder letters to members with expiring memberships;

11. Identify donors who have made pledges and generates pledge reminders;

12. Generate grant reports and aggregate data to support grant efforts.

ADMINISTRATIVE:

1. Create accurate reports in support of cross departmental data needs and the IA Department's fundraising efforts;

2. Provide implementation support for annual appeals and the annual development plan;

3. Order and maintain supplies for membership fulfillment, including membership gifts, membership card supplies, letterhead, envelopes and card holders;

4. Perform data mining for prospect research;

5. Organize and maintain individual, corporate and foundation prospect filing system within the IA Department;

6. Maintain the filing system of all donor contributions for backup support;

7. Provide auditors with pledge and in-kind back-up, as needed;

8. Support IA in cross departmental events with invitation support, RSVP systems, Auction items and other related administrative tasks;

9. Perform 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.;

10. Compile and submit donor information for the annual report.

OTHER:

1. Communicate in a friendly, professional and helpful manner with all employees, board members, guests and external contacts;

2. Maintain professional boundaries and behavior, including a positive, collaborative, solution focused and team-oriented attitude;

3. Utilize MS-Word, Excel and Altru to generate communications and reports;

4. Utilize MS-Outlook for email communications and scheduling;

5. Maintain the flexibility to accommodate occasional evening and weekend work, as needed.

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Signature   Date