



## Flourish with us as our Database Specialist - CRM!

Join our team of dedicated professionals in strengthening our community for current and future generations by helping people make a difference in the lives of all.

As the Database Specialist – CRM, you will be responsible for supporting database operations by processing and recording all constituent record transactions including but not limited to gift entry, event registrations, other record updates. This position will assist in performing database integrity processes as needed and offer backup support for grant and scholarship processing.

If you have at least 2 years of data entry experience and proficiency in Microsoft Word and Excel, we want to hear from you! Experience working with Foundant or another CRM database is preferred. Please see the detailed job description below.

We have been certified since 2022 as a silver-level Employee Friendly Workplace by the Fox Cities Chamber of Commerce. This certification recognizes employers who demonstrate a significant commitment to promoting work/life integration by creating a positive work environment and experience for all employees.

We offer a flexible and hybrid working environment. Our team currently works in our office at 4455 W. Lawrence Street in Appleton, WI, or remotely in the Fox Valley area. In addition to a flexible working environment, it is important to us to offer a generous benefit package to our team members. Our current package includes dental, health, and vision insurance, 401(k), paid time off, paid volunteer hours, and professional development. The position is expected to work 40 hours per week. The starting salary is \$25.50 per hour. A start date no later than September 2024 is preferred.

We are excited to learn more about your experience! **Please submit your resume and cover letter to [careers@cfoxvalley.org](mailto:careers@cfoxvalley.org) using the following email subject line: Database Specialist – CRM.**



## Job Description

**POSITION TITLE:** Database Specialist - CRM

**DEPARTMENT:** Finance and Database Operations

**LOCATION:** Community Foundation for the Fox Valley Region 4455 W. Lawrence St. Appleton, WI 54914

**REPORTING TO:** Director of Database Operations

**FLSA CLASSIFICATION (EXEMPT OR NON-EXEMPT):** Non-Exempt

**CLASSIFICATION:** Full-Time Benefits Eligible – 40 hours per week

**LAST UPDATED:** August 7, 2024

### POSITION SUMMARY

The **Database Specialist - CRM** is part of the Foundation's dedicated team of professionals who work together under the core values of integrity, respect, teamwork, stewardship, and diversity, equity, inclusion, and antiracism (DEIAR) to support the strategic direction and mission of the Foundation, strengthening our community for current and future generations by helping people make a difference in the lives of all.

The **Database Specialist - CRM** is responsible for supporting database operations by processing and recording all constituent record transactions including but not limited to gift entry, event registrations, other record updates as outlined below. This position will assist in performing database integrity processes as needed and offer backup support for grant and scholarship processing.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

#### Fundamental Responsibilities

- Process and analyze contributions for multiple entities to ensure accurate donor records and compliance with applicable regulations.
- Provide timely and accurate gift processing. Handle complex donations including stocks, wire transfers, planned gifts, Donor Advised Fund gifts, matching gifts and other transaction types as needed.
- Complete and develop processes to maintain database integrity including identifying discrepancies and adjusting records as needed.
- Process all donations from external giving platforms; research and/or work with other stakeholders to obtain necessary details for entry.
- Contact donors as needed regarding gift related errors, including declined credit cards, incomplete checks, and unspecified designations.
- Prepare receipts and acknowledgements for donations.
- Record, maintain, and adjust pledge records.
- Update donor records with demographic information derived from donations and other correspondence.
- Process all vendor invoices and issue weekly check or ACH payments.
- Process new fund and fund advisor portal setup and updates.
- Serve as primary contact for event and marketing campaign setup and management in the database.
- Serve as primary contact for data exports and database-driven reports from the CRM database as needed by internal stakeholders.
- Assist Foundation staff to respond to telephone and written inquiries from donors about their donations.
- Create and/or update standard work documents related to responsibilities.

***This job description describes the general nature and scope of responsibilities for this position. Please note other duties and responsibilities may be assigned or removed at any time.***



## **EDUCATION AND/OR EXPERIENCE**

- At least two years of data entry experience required.
- Experience working with Foundant or another CRM database preferred.
- Must be proficient in Microsoft Word and Excel, including mail merges.

## **KNOWLEDGE, SKILLS AND ABILITIES**

- Able to demonstrate teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.
- Ability to work in a fast-paced environment with demonstrated ability to manage multiple competing priorities.
- Quick learner with demonstrated progressive knowledge
- Ability to resolve issues timely and accurately.
- Effective time management, to establish priorities and meet deadlines.
- Continuous improvement skills to make processes more efficient.
- Excellent organizational skills and attention to detail.
- Strong oral and written communication skills.
- Ability to handle sensitive and confidential information.
- Ability to work independently with minimal supervision.
- Strong data entry skills with emphasis on accuracy and attention to detail.

## **WORK ENVIRONMENT AND JOB SPECIFICATIONS**

**The work environment and job specifications listed below are representative of those that must be met by an employee, with or without accommodation, to successfully perform the essential functions of this job.**

- Primarily perform work in an office environment.
- Frequently move around the office and access or use computers, office equipment, telephone, and any other pertinent supplies, space or equipment used to perform the duties of the position.
- Work with frequent interruption.
- Sit for long periods of time.
- Lift and/or move up to 10 pounds and occasionally lift and/or move up to 20 pounds.
- Travel occasionally to surrounding area businesses for events, meetings, etc.

***Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.***