

## Database Associate – Salesforce

### Position Summary

Reporting to the Operations Manager, this position will serve as the primary administrator for the Salesforce donor database system. The Database Associate is responsible for a broad range of tasks related to the efficient operation and management of the Salesforce database. This includes data entry and updating of all donor records, and related information, generating and formatting donor acknowledgement letters, and providing data in report form to staff. The Database Associate will standardize and coordinate the entry of data and mining of information, as well as maintain database integrity. This is a regular part-time-60%, benefitted, non-exempt position.

### Responsibilities

#### A) Salesforce Database Administration

1. Serve as primary system administrator for Salesforce Non-Profit Success Pack (NPSP) platform with 10 users.
2. Responsible for managing users, security roles, permission sets, profiles, groups, sharing rules and workflows.
3. Provide support for Salesforce users by providing training, answer user questions and troubleshoot issues.
4. Assist with tracking using third-party database integrations, including Salsa Engage and Mailchimp.
5. Ongoing maintenance/clean-up of Salesforce database to ensure accurate information for reports and queries.
6. Build custom reports, dashboards, workflows, email templates and page layouts as requested.
7. Create and maintain custom objects, formula fields, workflows, custom views, and other content of intermediate complexity as requested.
8. Lead the effort to evolve Salesforce to meet the organization's changing needs.

#### B) Donor Database & Development

1. Maintain the integrity of the Salesforce database by following all procedures for proper data entry, many of which have been customized to George Mark Children's House specifications.
2. Maintains awareness of fundraising/donor database industry trends and best practices and implements CRM procedural and reporting updates as needed.
3. Monitor, input and review, daily gift processing data including gifts from third party portals such as Salsa Engage, Classy, Benevity, Network for Good, Donor Advised Funds and other portals to track Electronic Fund Transfers.
4. Process and acknowledge donations from all sources. This includes coding and entering gifts, soft credits, address updates, new donor entry, identifying duplicates and day to day account maintenance.
5. In collaboration with the Operations Manager, prepares and mails gift acknowledgement letters and mailings in a timely manner while ensuring accuracy and attention to detail.
6. Monthly reports detailed by donor giving category for revenue goal tracking purposes as requested by Finance and Advancement Departments.
7. In collaboration with Operations Manager, create systems to ensure that gift processing meets fiscal standards and accountability.

### Hiring organization

George Mark Children's House

### Employment Type

Part-time

### Job Location

2121 George Mark Lane, 94578, CA, United States

### Base Salary

\$ 26.00

### Date posted

February 27, 2020

8. Develop a standard operating procedures manual.

### **C) Finance Department Support**

1. Works closely with the Finance department to reconcile donations and restricted grants.
2. Meets month-end deadline to submit all Database reports to Finance Department as needed including cash, check, gift in kind and credit card donations, pledges and pledge payments.
3. Works closely with Finance to prepare audit reports.

### **D) Special Event, Communications and Community Engagement Support**

1. Supports the Director of Advancement with donor communications, including but not limited to communication tracking, tracking all solicitations for revenue and expenses, mailing lists, and donor recognition reports as requested.
2. Records corporate sponsorship invoicing and payments for all special events in Salesforce.
3. Produce, maintain and edit mailing lists for events.
4. Assist in the development and maintenance of mailing lists of donors and donor prospects.
5. Produce reports from Salesforce to support development planning efforts.
6. Generate reports and customized, one-off reports requested from other Advancement staff in a timely manner.
7. Perform other duties, as requested.

### **Qualifications**

1. Must have the ability to work comfortably in an alternative healthcare setting serving families and children who are seriously ill or dying.
2. Demonstrate ability to communicate effectively to GMCH children-patients, families, caregivers, staff, volunteers and donors using both written and verbal skills.
3. Interest in and ability to perform tasks in a culturally sensitive manner without regard to age, ethnicity, religion, national origin or socioeconomic status.
4. This position requires conduct of the highest professional and ethical standards with patients, families, staff, volunteers and donors at all times.
5. Applicant must be highly proficient in spoken and written English.
6. Skills required include: managing multiple, competing and varied tasks, time management, listening skills, problem solving, decision making, and successfully managing work-flow.
7. Applicant must be able to pay careful attention to details and be able to record data accurately.
8. Ability to maintain the confidentiality of information regarding company financials and other information.
9. Ability to operate a computer with Salesforce software and Microsoft Windows Office Suite software, specifically Excel, Word, and Outlook.

### **Education and Experience**

1. Minimum Associate Degree.
2. 1-4 years of relevant experience.
3. Experience maintaining CRM data including experience in report writing and analyzing data.

4. Experience with Salesforce Non-Profit Success Pack (NPSP) and implementation preferred.
5. Experience with Salsa Engage and Classy not required, but preferred.
6. Salesforce Certification not required, but preferred.