

Advancement Systems Coordinator

Grade: 9

Reports to: Assistant Director of Advancement
Job Status: Full-Time

Department: Advancement
Approval Date: April 2019

Job Summary:

The Advancement Systems Coordinator is responsible for managing all elements of the Aquarium's customer relationship management (CRM) system, including constituent record management, daily gift processing, data mining and organization and ongoing optimization of the software system. This position will work closely with the Finance division to ensure accurate and timely gift processing and reconciliation of giving data. He/she will also provide prospect research support to the Advancement division, working closely with gift officers to recognize donor engagement opportunities based on proactive analysis of giving trends of individual donors in the CRM system. This position is also responsible for the upkeep of the Aquarium's CRM system policies and procedures, updates to our Gift Acceptance Policy and regular training of necessary personnel on the basic functions of the CRM system to best utilize this resource in support of revenue generation and proper donor cultivation and stewardship.

Essential Functions:

- Manage constituent management database, ensuring data integrity and providing user support and training to designated staff
- Collaborate with Finance to ensure timely gift entry and processing as well as proper gift allocations and restrictions, as applicable
- Proactively capture biographical and data updates on donor and prospect records
- Work with gift officers to execute donor acknowledgement, benefit administration and fulfillment in a timely and sensitive manner
- Develop, generate and disseminate critical weekly, monthly, quarterly and annual financial and advancement reports to relevant Advancement and Finance team members, including a monthly reconciliation between CRM and finance systems and accurate contributed revenue reports for the Finance and Audit Committee and Board of Directors
- Serve as the main point of contact for Advancement during the Aquarium's annual audit, providing the auditors with all necessary gift documentation and contributed revenue reports
- Maintain an accurate pledge schedule for major individual, corporate and foundation gifts, generating an annual pledge payment letter for each, according to the documented payment schedule
- In close collaboration with the Advancement team develop, compile and manage lists for direct mail/email campaigns, tributaries, and other institutional needs as they arise, ensuring accuracy and data integrity
- Responsible for running imports, backend import, AddressFinder, Deceased Finder and others, while maintaining data integrity
- Responsible for processing gifts for events that take place off-site utilizing Blackbaud Merchant Services (BBMS) and ensuring PCI compliance for all gifts made via credit card or over the telephone
- Collaborate with Membership and Finance as needed to provide support for specific projects
- Coordinate and monitor database needs with IT department. Serve as the primary contact for and liaison to the Aquarium's CRM.
- Support the Advancement team by providing event staffing coverage, as needed

Other Duties and Responsibilities:

- Ability and willingness to work some nights and weekends required; must be available and willing to work December 15 – 31 in order to fulfill critical year end responsibilities
- Develop a fluent understanding of Aquarium programs
- Develop a fluent understanding of the Aquarium's business processes as it relates to incoming donations and other systems integrating with Raiser's Edge. Support the mission by participating in Aquarium sponsored programs and events on a regular basis.
- Follow South Carolina Aquarium Gift Acceptance Guidelines, Policies and Procedures. Provide input on updates as needed.
- Adhere to the South Carolina Aquarium Policies & Procedures.
- Coordinate volunteer support on an as needed basis for projects.
- Maintain a customer service demeanor at all times. Responds to donors with the appropriate level of urgency. Ask questions to identify donor's needs or expectations in a pleasant and respectful manner. In completing tasks, continually consider the impact of those actions on the donor and is flexible to accommodate donor's needs.
- Keep abreast of trends in giving, giving days, matching gifts, etc. to inform the Advancement team of best and emerging practices in the field and to continually optimize revenue opportunities
- Create and maintain data management documentation. Work with the team and Finance to establish sound policies, processes and procedures. Research and present best practices to the team.
- Other duties as assigned.

Knowledge, Skills and Abilities:

- Proficiency with Microsoft Word, Excel and Outlook.
- Proficiency working in a CRM system REQUIRED. Experience with Blackbaud's Raiser's Edge preferred.
- Excellent verbal, written communication, presentation and interpersonal skills.
- Must be a detail and goal oriented, enthusiastic individual able to exercise independent judgment in completing tasks, prioritizing and meeting deadlines.
- Demonstrated organizational skills; able to manage multiple projects and move quickly from one to another while maintaining thorough records.
- Ability to be flexible and balance competing priorities.

Education and Experience Required:

- Demonstrated experience in effective database management required.
- Bachelor's degree is related field preferred.
- Experience working with a development team for a nonprofit organization preferred.

Physical Requirements:

- Requires average walking, standing, bending, stooping, crouching, sitting and computer and phone tasks required. Occasional ability to lift up to 50 lbs.

Working Conditions:

- Normal office environment. Occasionally need to work weekends and nights.

The above statements are intended to describe the general nature and level of work performed by people assigned to this classification. They are not construed to be an exhaustive list of all job duties performed by the personnel classified.

The Aquarium is an "at-will" employer, and as such, employment with the Aquarium is not for a fixed term, or definite period and may be terminated at the will of either party, with or without cause and without prior notice.