JOB DESCRIPTION

TITLE: Manager of CRM Operations   **DATE:** March 2023

DEPARTMENT: Operations   **SUPERVISOR:** Chief Operating Officer

FLSA Classification: Exempt

SUMMARY:

The Manager of CRM Operations is an integral member of the Operations Department and is responsible for the management of the Foundation's CRM donor database. For over 60 years the Marine Corps Scholarship Foundation has been Honoring Marines by Educating Their Children, providing higher education scholarships to 2,600+ children of Marines annually across all 50 US states and overseas. As we embark on an ambitious strategic plan to grow the Foundation, we are expanding and maturing our fundraising, program, and data management operations. We are seeking a passionate, creative, technical systems thinker to help us manage and improve processes and tools, increase the quality and usefulness of data, and eliminate inefficiency, providing us the ability to scale and meet the goals of the organization. We expect this role to grow as the organization grows in volume and complexity.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Database Administration:

- Perform ongoing maintenance and quality management of the CRM donor database to ensure data hygiene, data integrity, and quality control, including the removal of duplicate records, managing missing fields, and ensuring a data lifecycle process is implemented.
- Develop and document a set of database business rules, user permissions, data standards, naming conventions, and organizational structure of data and make modifications as new technology, software updates, and Foundation needs emerge.
- Identify and define challenges to quality, productivity, or other critical success factors, collect relevant information, draw insightful conclusions, and develop concepts and solutions to address the challenge(s).
- Examine existing database standards and processes and develop solutions that improve the donor database's capabilities. Identify and implement automation where feasible.
- Maintain the structure of attributes, code tables, and other set-up functions.
- Collaborate with various departments on reconciliations of data between systems.
- Collaborate, brainstorm, and strategize with multiple teams to develop financial and fundraising performance reporting tools that support Foundation fundraising efforts.
- Develop and execute institutional queries and reports for review and analysis of constituent data for specific constituent populations, gift data, and other needs.

- Maintain a productive relationship with software suppliers, vendors, and contractors to maximize utility of the CRM business system.
- Remain current and apply best practices in database management.
- Contribute to the overall success of the Foundation's mission and vision by performing other duties as assigned.

Record Management:
- Analyze and improve constituent record management procedures to reduce errors, eliminate inefficiency, and ensure data quality.
- Create new and bulk records as needed; identify and seek solutions for missing information.
- Maintain data quality checks for completeness, accuracy, recency, and compliance related to constituent moves management processes.

Gift Processing:
- Oversee gift recording process including entry, attribution and allocation, batching, receipting/acknowledgement, reporting, and reconciliation.
- Conduct accurate and timely gift deposits and processing of gifts over $1,000.
- Analyze, document, and continuously improve gift processing procedures to reduce errors, eliminate inefficiency, and reduce delay; implement automation where feasible.
- Create, implement, and monitor compliance of protocols for gift entry into CRM and finance system (currently The Raiser's Edge and The Financial Edge)
- Collaborate with the Advancement and Finance Departments to ensure accuracy, balance funds, and manage gift data and reports.
- Manage accuracy of tax receipts in compliance with audit standards and ensure the current Advancement Department's gift acknowledgement process is followed to ensure proper stewardship of donor dollars.

Training:
- Support internal staff's knowledge, understanding, and training of CRM database utilization, industry terms, best practices, and emerging technology.
- Oversee the training of staff on database-related software and tools.

EDUCATION AND/OR EXPEREINCE:
- Bachelor's degree preferred.
- 5+ years' experience with non-profit CRM database management, familiarity with Blackbaud's The Raiser's Edge and Financial Edge software a plus.

REQUIRED SKILLS AND ABILITIES:
- Commitment to the Foundation's mission and to reflecting core values of teamwork, trust, integrity, and drive in relationships with colleagues and partners.
- Understanding of donation processing, constituent management, and general accounting principles.
- Understanding of data manipulation and presentation tools such as reporting and dashboarding systems.

- Ability to work on a wide range of projects simultaneously and balance multiple competing priorities with a high degree of autonomy in a fast-paced work environment.
- Strong analytical skills, diligent attention to detail, and exceptional organizational skills.
- Strong verbal and written communications skills, with an ability to present complex data in a succinct, compelling way to a wide range of audiences.

WORKING CONDITIONS:
- Working conditions are normal for an office environment.
- Requires working in front of computer for extended amounts of time handling data entry.
- Must be able to work outside normal working hours (evenings and weekends) as needed to accomplish the Foundation's mission.
- Position located in Alexandria, VA; hybrid telework may be considered after 6 months.