



Lubbock Area United Way

LUBBOCK AREA UNITED WAY
Job Description
Data Administrator and Analyst

Reports To: Senior Vice President Donor Engagement
FLSA Status: Non-Exempt
Prepared By: Amy Berry, Senior Vice President Donor Engagement
Prepared Date: November 5, 2024
Approved By: Amanda McAfee, President/CEO
Approved Date: Pending

SUMMARY

The Data Administrator and Analyst is responsible for maintaining the integrity of the donor data system through accurate and careful management of the CRM database. Major tasks include data entry and verification of donor pledges and payments, building precise and effective reports, and working with the Senior Vice President of Donor Engagement to analyze trends and build donor matrixes.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

1. Maintain a complete and accurate CRM of all current, lapsed, and potential donors and volunteers. Update the database with information from staff and volunteers and research other relevant sources.
2. Process campaign pledges promptly, verifying the information for accuracy. Produce reports of pledges posted to be distributed to revenue development staff.
3. Prepare accurate deposit slips from fully paid gifts for the Chief Financial Officer.
4. Maintain multi-year records for all aspects of fundraising across the entire organization. Provide analytical information for senior staff including effective charts and models.
5. Provide updated reports and analysis on the current year's campaign, campaign divisions, and other revenue development projects.
6. Monitor third-party processors and United Way Worldwide websites for new or updated pledge data.
7. Create and process reports to enable the timely and accurate completion of various revenue development tasks (e.g., Database 2, thank you letters, and tax letters).
8. Prepare giving profiles, donor and volunteer lists, and call packet materials for donor and CEO visits.

9. Maintain up-to-date rosters for all teams, committees, and ad hoc groups.
10. Serve as a lead trainer for all staff on the basic operation of the database.
11. Conduct periodic maintenance of the database including installing software updates and patches from the software vendor.
12. Consult with representatives from the CRM software provider and United Way's IT support provider to resolve technical issues as they arise.
13. Provide front office coverage as needed.

SUPERVISORY RESPONSIBILITIES

This job has no supervisory responsibilities.

EDUCATION and/or EXPERIENCE

Bachelor's degree preferred. A high school diploma or GED and a minimum of three years related experience or training in CRM software management and office administration; or an equivalent combination of education and experience is required. Previous experience with a sophisticated CRM is preferred.

QUALIFICATIONS

To perform this job successfully, an individual must be able to satisfactorily perform each essential duty. The requirements below represent the knowledge, skill, and/or ability needed. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

SKILLS

1. Highly effective verbal, listening, writing, and communication skills.
2. Proven ability to follow through on assigned tasks.
3. Ability to use Excel at a highly proficient level.
4. Ability to follow through with requests for information from co-workers or donors.
5. Ability to plan in advance and effectively manage priorities to meet deadlines.
6. Ability to work cooperatively as a team member.

7. Highly proficient in computer skills, including Microsoft Office products.
8. Attention to detail with a high level of accuracy.
9. Ability to manage multiple projects.
10. Ability to manage large amounts of information presented in written and oral information in a fast-paced environment.
11. Ability to maintain a high level of accuracy in preparing and entering information.
12. Ability to complete high-volume data entry, spreadsheet, word processing, and email at a highly proficient level.

PHYSICAL DEMANDS

United Way employees must be able to work in a routine office environment. This includes long hours sitting while using a computer and other basic office equipment, which may cause eye and muscle strain. All employees make personal visits to various locations in the South Plains area, which requires reliable transportation and the ability to navigate to each location.

Employees may occasionally lift materials and supplies of up to 25 pounds.

WORK ENVIRONMENT

United Way employees work in a fast-paced environment. All staff manage numerous interruptions including, but not limited to phone calls, e-mails, visitors, and impromptu meetings.

Reasonable accommodations as stated in Title 1 of the Americans with Disabilities Act may be made to enable individuals with disabilities to perform essential duties and responsibilities.

To apply for this position, please email a cover letter and resume to Amy Berry at aberry@lubbockunitedway.org.