

TURNING POINT OF LEHIGH VALLEY, INC.
JOB DESCRIPTION

Title: CRM and Data Management Specialist	Hours: 20
Pay Grade: 1	FLSA Classification: Non-Exempt
Supervisor: Director of Advancement	Position Type: Part-Time, Non-essential, Remote

POSITION SUMMARY:

The CRM and Data Management Specialist works closely with and reports to the Director of Advancement to maintain the organization's Virtuous CRM database, ensure accurate data entry, and generate analytical reports to support fundraising and donor relations initiatives. Primary responsibilities of this position include processing gifts, maintaining donor records, generating reports, supporting database integrity, and managing the donor receipting process. This position requires strong attention to detail and proficiency with database management.

LEVEL 1

CRITERIA:

All employees beginning employment with the agency or moving from another team within the agency to the CRM and Data Management Specialist position will be a Level 1.

TASKS:

- Complete 45 hours of New Advocate Training within one (3) month of the date of hire.
- Complete an additional (10) hours of training on domestic and intimate partner abuse issues annually.
- Obtain Virtuous Accredited Administrator Certification within 30 days of hire.
- Assist in reaching the goals for the agency's annual work plan and strategic plan.
- Demonstrate:
 - A working knowledge of domestic abuse and intimate partner issues, the empowerment philosophy, and trauma-informed practices.
 - Knowledge of and adherence to all agency policies, procedures, and Code of Professional Responsibility.
- Serve as part of the staff team in direct program service provisions including, but not limited to, Helpline and office/telephone coverage.
- Attends and actively participates in all monthly staff meetings, monthly team meetings, and bi-weekly supervision meetings, and provides daily summary of completed work.
- Assist with other duties in furtherance of the mission of Turning Point, as may be needed and required, within the agency.
- Manage and maintain the Virtuous CRM database, ensuring data accuracy and integrity.
 - Process daily gift entry and acknowledgments following established procedures in the Fiscal Manual.
 - Run the record of reconciliation and provide to YPTC monthly.
 - Manage the receipting process for various gift types including general donations, special appeals, in-kind gifts, and monthly giving.
- Generate and send timely gift acknowledgment letters and tax receipts according to established procedures.
 - Maintain copies of donation receipts in the appropriate folders within the Advancement directory.
 - Coordinate with the Advancement Team on special acknowledgments.
 - Process and import donation data from third-party sources

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- Reconcile donation records with financial systems and third-party payment platforms.
- Assist with data cleanup projects and database maintenance.
- Support the implementation and optimization of automated workflows within Virtuous.
- Create and monitor reports and queries.
- Track progress toward fundraising goals and prepare reports for leadership.
- Generate regular reports on fundraising performance, donor trends, and campaign effectiveness.

LEVEL 2

CRITERIA: A CRM and Data Management Specialist Level 2 will be proficient in and consistently complete all Level 1 tasks for at least twelve (12) months and:

- Demonstrate initiative during at least the prior three (3) months to proficiently assume and complete Level 2 responsibilities; and
- Continue to demonstrate consistent proficiency in all Level 1 tasks; and
- Has not had any corrective notice provided within 3 months of their anniversary date.

TASKS:

- Develop and document standard operating procedures for database management and receipting processes.
- Implement and optimize automated workflows within Virtuous CRM.
- Create and implement data quality control measures.
- Identify forms, materials, or other issues that may be incorrect or obsolete and proactively participate in resolving the issue.
- Serve as a resource to co-workers and volunteers in problem-solving related to database management.
- Provide reports and training to co-workers as part of agency staff meetings or other scheduled forums.
- Develop CRM training for Staff, Board, and Ad-Hoc committee members.
- Analyze donor data to identify trends and opportunities for donor engagement.

LEVEL 3

CRITERIA:

A CRM and Data Management Specialist Level 3 will be proficient in and consistently complete all Level 1 & 2 tasks for at least two (2) years and:

- Demonstrate initiative during at least the prior six (6) months to proficiently assume and complete Level 3 responsibilities; and
- Continue to demonstrate consistent proficiency in all Level 1 & 2 tasks; and
- Has not had any corrective notice provided within 3 months of their anniversary date.

TASKS:

- Identify best practices in database management and assist in updating agency materials and protocols to reflect these practices.
- Develop and implement data governance policies and procedures.
- Develop and implement comprehensive data management strategies.
- Lead the implementation of new CRM features and integrations.
- Design and implement sophisticated donor acknowledgment and stewardship systems.
- Create advanced reporting systems to support strategic decision-making.
- Provide advanced training and support to staff on database utilization.

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QUALIFICATIONS:

- At least one year of experience in database management, preferably in a nonprofit setting.
- Fluency in English and another language is preferred.
- Possess a valid Pennsylvania Driver's License and/or have the ability to travel to off-site locations.
- Proficiency in CRM database management and Microsoft Office Suite, particularly Excel
- Possesses strong and effective written and verbal communication skills.
- Strong attention to detail and accuracy in data entry within the CRM
- Efficient in prioritization and organization
- Experience with donor acknowledgment and receipting processes.

PHYSICAL TASKS:

- Ability to work in a home office environment.
- Ability to sit for extended periods while working on a computer.
- Have the emotional ability to participate in virtual presentations and meetings.
- Have the emotional ability to work with clients in trauma through virtual means.
- Regularly speak clearly so listeners can understand as well as understand the speech of another person through virtual communication.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the above referenced tasks.

This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature:

Date:

Authorized Signature:

Date:

Turning Point of Lehigh Valley is an Equal Opportunity Employer

Submit application to: hr@turningpointlv.org