

Class No.:	
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Pay Group:	26

CLASS SPECIFICATION

PHILANTHROPY DATA ANALYST

NATURE AND SCOPE OF WORK

The Philanthropy Data Analyst is responsible for managing the Foundation CRM database related to donors, alumni and other key relationships. The Analyst is the resident Raiser's Edge expert on the Philanthropy and Alumni Relations (PAR) team. The Analyst supports PAR in ensuring that donor, alumni and partner data is appropriately captured and updated in the database to facilitate its use in the achievement of department goals. The Analyst is responsible for reconciling and preparing accurate monthly revenue reports that enable data-driven decision making for leadership and Finance. The role also manages the use of analytics for propensity modeling, capacity rating and segmentation for communications purposes. The Analyst oversees and manages the gift booking process and an effective gift pledge tracking and alert system for relationship managers. The Philanthropy Data Analyst reports to the Director, Philanthropy & Alumni Relations.

ILLUSTRATIVE EXAMPLES OF DUTIES

- Provides statistical data to assist in monitoring fundraising activities and handles all imports and exports of data.
- Designs custom reports and queries, customized dashboard reports and pivot reports for monitoring key performance indicators, such as: financial comparisons and revenue YTD reporting, activity metrics, donor segmentation, appeal analysis, prospect management and donor recognition.
- Provides monthly statistical reports to manage progress towards overall departmental goals and also prepares routine and ad hoc queries for reports.
- Ensures CRM database configuration will allow for streamlined, efficient provision of data lists for annual financial reporting, tax receipting and donor acknowledgment, communications, impact reporting, e-appeals, events and invitations.
- Imports Alumni data from Banner into Raisers Edge database on a bi-annual basis.
- Responsible for completion of all constituent data entry and updates.
- Audits and confirms accuracy of constituent lists.

- Responsible for refining the gift processing system; continually looking for methods to enhance process for data retrieval and information management.
- Works collaboratively with the Philanthropy Operations Officer on shared gift processing responsibilities and activities.
- Conducts database research, review and analysis making recommendations relating to existing, new and emerging fundraising technologies.
- Acts as primary contact with IT to troubleshoot any technical issues and evaluates need for and recommends upgrades and fixes/patches when necessary.
- Receives all returned mail and enters or distributes for entry and update as appropriate.
- Continuously runs queries to scan database for duplicates and manually deletes or merges duplicate records as appropriate.
- Identifies third party sources of information to improve and enhance CRM database; remains current with best practice in CRM technology and fundraising methodology.
- Performs additional data management duties as required by the Director.

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Ability to maintain a high degree of confidentiality and to handle sensitive issues with tact and diplomacy.
- Ability to be proactive, and to identify projects, research options, develop recommendations, create procedures and implement change.
- Ability to multitask, work in a fast-paced environment, manage competing priorities and accurately deliver projects to meet deadlines.
- Focused, accurate and detail oriented.
- Able to work independently and as part of a team.
- Knowledge of project management and research skills.
- Thorough knowledge of Blackbaud Raiser's Edge NXT is preferred; or extensive knowledge of other CRM platforms.
- Broad knowledge of reporting tools and the ability to design and develop custom reports, dashboards, queries and pivot reports.
- Solid working knowledge of CRA and Data Privacy regulations.
- Thorough knowledge of Excel, Word Office programs.

REQUIRED TRAINING AND EXPERIENCE

- Completion of a Bachelor's degree in a related discipline.
- Work requires communications, analytical and organizational skills.
- Three years of work experience with the CRM management, preferably NXT, in the non-profit environment.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS

- None.