



## Friends of the Children National JOB DESCRIPTION

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<b>Title:</b>	Salesforce Database and Grants Specialist	
<b>Reports to:</b>	Chief Officer, Public Funding and Policy	<b>Status:</b> Full time, Exempt

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Effectively support Friends of the Children - National CRM (customer relationship management) software in order to track and manage our \$25 million expansion fund. Maintain accurate prospect, donor and grants tracking information in Salesforce. Work closely with members of the Expansion team on the identification, solicitation, cultivation, and stewardship of major donors and prospects. Assist with grant management and monitoring processes for more than \$6 million in government grants; work closely with National team to ensure accurate reporting and procedural compliance for all grants, including both government private grants; support National and its subgrantees (chapters and affiliates across the country) to meet grant compliance and reporting requirements. Provide accurate and timely processing of gift and acknowledgment correspondence.

### Essential Tasks

#### Salesforce

- Work with the Expansion team to track prospect and donors for our \$25,000,000 expansion fund.
- Serve as the primary administrator for the Salesforce grant management and donor database system and provide the necessary training to staff; write standard operations procedures as required.
- Continually push the evolution of Salesforce by collaborating with colleagues on new ways to leverage system's functionality to address user pain-points and achieve goals.
- Generate reports (internal and external), and customized, one-off reports on demand.
- Assist with and provide recommendations regarding general analysis of lead, grants and compliance data.
- Customize dashboards per management's requests.
- Monitor new Salesforce released features/apps and functionality to provide recommendations to management.
- Provide support to troubleshoot issues and identify resolutions.
- Ensure and enforce data integrity and standardization.
- Monitor, input, review, and approve data in Salesforce.
- Maintain Friends of the Children's various databases so they are up to date and accurate.

#### Gift and Grants Processing

- Provide support to Expansion team to make sure that fundraising goals are met. Working with the Expansion team and senior Finance staff, help identify donors and gifts in achieving projected revenue plan.

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- Work proactively with Expansion team to review and revise criteria and make recommendations for targeted mailing lists, alignment with best practices, and optimal usage of prospect and donor data.
- Review and correct prospect and donor mailing information in lists and database, and provide final scrubbed list to senior staff for review.
- Respond to requests for unplanned mailing lists, donor and gift data in a timely manner.
- Collaborate on data-informed marketing strategies and expansion initiatives. Identify methods for strengthening existing recruitment and stewardship efforts, and explore opportunities for new donor prospects and giving campaigns.
- Enter and update gift and donor records in Salesforce to efficiently provide accurate contribution revenue reporting and donor acknowledgment correspondence.
- Input daily contribution (cash and Gift-In-Kind) details into Salesforce in accordance with Gift Batch Entry processes.
- Produce donor acknowledgement letters and receipts for President's signature within 48 hours of gift receipt. Scan and file signed letters in organized, retrievable manner.
- Produce donor giving statements as needed and requested by staff and donors.
- Process grant agreements.
- Manage matching gift applications and tracking.

## Grants Compliance and Monitoring

- Work collaboratively with the Finance team to ensure compliance to state statutes, agency regulations and specific grant requirements.
- Work with National team to ensure an accurate, timely, efficient and transparent process for the entire grant life cycle, from proposal to close.
- Serve as a liaison with National staff, subgrantees, and other stakeholders on issues regarding grant compliance and monitoring.
- Develop materials to facilitate the preparation of reports and documentation required by grantors.
- Help formulate internal, operating and fiscal systems, policies and procedures for evaluating and reporting data with review and analysis of federal, state and local laws, regulations and administrative requirements across awarded gifts and grants.
- Assist with subgrantee monitoring processes, including collecting and analyzing data, documenting results, and identifying and discussing implications.

## **Knowledge, Skills and Abilities**

- Experience managing and maintaining CRM data, including thorough experience in reporting, data, processes and campaigns.
- Experience with Salesforce administration and implementation preferred.
- Understanding of fundraising cycles and best practices, donor engagement strategies, and donor stewardship is required. Experience with grants or donor tracking systems is preferred.

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- Ability to define problems, collect data, establish facts, and draw conclusions.
- Demonstrated ability to manage multiple projects concurrently under deadline pressure and changing priorities.
- Ability to solve problems creatively in order to meet organizational goals and objectives.
- Ability to review the work of others to ensure conformance to standards.
- Ability to communicate effectively across a broad spectrum of staff, both orally and in writing, is required.
- Strong focus and acumen with data, reporting and analysis.