

Data and Prospect Research Associate

The Community Foundation for Greater Buffalo (Community Foundation) is seeking to hire a full-time **Data and Prospect Research Associate**

JOB SUMMARY

The Data and Prospect Research Associate is a member of the Giving Strategies Team and reports to the Director of Gift Planning. The position is responsible for supporting the Giving Strategies team with all database management and research efforts including prospect and client research, moves management processes, activity tracking and data reporting needs. This includes ensuring the accuracy, integrity and effective use of all data-related systems including the following software platforms: Salesforce, a Customer Relationship Management (CRM) system; Foundation Information Management System (FIMS) for information that pertains to prospects, clients and funds; and DonorCentral, an online client portal.

A successful Data and Prospect Research Associate is highly organized, proactive, excellent at follow-through, skilled at database management and possesses a high level of computer competency. This role will ensure that appropriate staff is trained in the proper use of these software platforms, developing and implementing policies to guide data entry, and making sure that these software platforms are maintained effectively, and can be relied upon for the production of accurate information and reporting.

KEY RESPONSIBILITIES

- Maximize Giving Strategies team's use of the CRM (Salesforce) system and serve as the staff resource for the system
- Understand, maintain and regularly update the Profile and Fund modules of FIMS for information that pertains to prospects, clients and funds
- Develop standards, protocols and policies for all aspects of data entry in these software systems, manage clean up as required, and monitor ongoing compliance
- Maintain accurate and updated contact information on clients, prospects, client and prospect group constituencies and others in such a manner as to facilitate internal reporting and targeted mailings by category
- Be proficient with the use of tools and techniques to identify charitably inclined individuals and organizations that could be interested in working with the Community Foundation.
- Identify and capture useful data about clients and prospects for cultivation and reporting purposes—i.e., information about backgrounds, including professional and familial relationships and their charitable desires
- Manage the Giving Strategies fund statement process in partnership with the Finance Team

- Have primary responsibility for DonorCentral including maintenance, monitoring, setting up and removing users, trouble-shooting and assisting with the process of educating employees to answer client questions
- Be the Community Foundation's product champion and vendor contact for the above referenced software systems and stay current on these platforms that support the Giving Strategies team.
- All other duties as assigned

TECHNICAL EXPERTISE/EXPERIENCE AND QUALIFICATIONS

- Bachelor's degree in business, computer science, accounting, finance, math or related field is preferred
- Three to five years of demonstrated computer proficiency working with databases and related software platforms
- Experience with Salesforce.com, Raisers Edge, FIMS or other client management databases preferred
- Experience using online products and services, and other data sources, to effectively research and support prospect identification efforts
- Understanding and adherence to high standards of ethics and confidentiality
- Ability to attend off-site events, such as community events and meetings, and represent the Community Foundation appropriately.
- Proficiency with including Microsoft Office, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook

ABOUT THE COMMUNITY FOUNDATION:

The Community Foundation for Greater Buffalo, a 501(c)(3) organization, was established in 1919 to enhance and encourage long-term philanthropy in the Western New York community. The Community Foundation's mission is: Connecting people, ideas and resources to improve lives in Western New York. For nearly 100 years, the Community Foundation has made the most of the generosity of individuals, families, foundations and organizations who entrust charitable assets to the Community Foundation's care. www.cfgb.org.

APPLICATION PROCEDURE:

We're looking for top talent: people who want to use their abilities to make a lasting difference. If that is you, then please send a cover letter explaining your interest in this position and what you would bring to the Community Foundation for Greater Buffalo. Send cover letter and resume as a single Word or PDF document via email to: Jobs@CFGB.org. No calls please. Application deadline: Open until filled.

The Community Foundation for Greater Buffalo is an equal opportunity employer committed to valuing diversity and practicing inclusion.