

Database & Stewardship Coordinator

Description

Role Purpose:

The Database and Stewardship Coordinator is responsible for maintaining the integrity of the Customer Relations Management (CRM) database (Raiser's Edge), including donor demographic information, gift records, and market research analysis. It is also responsible for training and supporting staff, leading special database projects as well as generating thank you letters, reports, queries, and mailing lists. Additionally, this position works closely with the Foundation accountant on fund management and financial reconciliation. This position is responsible for conducting prospect research using the Internet, in-house files, and other external resources. Donor and patient confidentiality is of utmost importance.

Responsibilities:

- Maintain SSM Health St. Mary's Foundation - Madison gift processing policies and procedures by processing incoming gifts and recording them in the Raiser's Edge database on a daily basis as per the Foundation's policies and procedures guide in order to ensure that accurate donor acknowledgement letters and receipts are mailed within 48 hours of receiving the gift.
- Record and track pledges. Produce pledge reminders according to their pledge schedule. Monitor delinquent pledges, alert appropriate staff of delinquency and make adjustments to pledge records as needed. Enter donor information in appropriate areas of the constituent record (i.e. donor interests, biographical information, obituaries).
- Maintain Raiser's Edge database of donor records by performing necessary updates and clean-up in order to ensure data integrity both for proper donor acknowledgement and accurate development reports and solicitation lists. Actively participate in the Madison Raiser's Edge User Group and Blackbaud training. Enters sponsorship data and participant information, and generating sponsorship invoices and receipts.
- Manage and administer Raiser's Edge database application in cooperation with SSM Information Systems by serving as liaison to Blackbaud customer service while troubleshooting software issues and performing timely software upgrades in order to ensure that the application is running as efficiently as possible.

- Prepare and reconcile Foundation contribution result reports on a regular basis using the Raiser's Edge database and occasionally Microsoft Excel in collaboration with Foundation accountant. Serve as a liaison to Human Resources and Payroll departments in administering the employee payroll deduction gift process. Maintain a system for receipting all payroll donors at the end of each calendar year.
- Conduct and oversee staff training related to utilization of Raiser's Edge and NXT in order to increase staff effectiveness in using the application on an independent basis for routine data entry and reporting functions.
- Maintain and create relevant electronic/ paper files according to Foundation office standards. Pull donor recognition listings based on giving history and review for accuracy.
- Complete database/patient list screening daily. Use ResearchPoint, Wealth Engine, or other sources to identify Foundation (including major gift, annual giving, corporate and foundation) prospects.
- Complete individualized prospect research reports according to research request protocols. Manage and maintain a library of prospect research tools including fee-based online services and databases and historical Foundation records in order to provide development staff with complete, timely and accurate information in response to data requests.
- Actively participate in the Wisconsin Chapter of APRA.
- Other Duties as Assigned.

Qualifications

Minimum Qualification:

- Associate Degree or equivalent experience in a related field, i.e. data entry, accounting, or market research.
- Experience with Raiser's Edge database. Experience in a fundraising office with an understanding of the donor cultivation/ solicitation practices. Knowledge of federal tax regulations related to charitable gift receipting.
- Three (3) years of experience in database entry, reporting, and market analysis in Customer Relations Management systems. Proficient with Microsoft applications particularly the MS Office Suite. Basic accounting knowledge.
- Absolute accuracy and attention to detail. Fluent application of database management, word processing and spread sheet applications. Ability to solve data problems, prioritize work and design innovative solutions to satisfy the information needs of the Foundation Board of Directors and staff. Strong customer service and teamwork skills.

Preferred Qualification:

- Bachelor's Degree

St. Mary's Hospital – Madison –

St. Mary's is a 440-bed tertiary referral hospital offering inpatient and outpatient treatment and diagnostic services in primary care and nearly all specialties. Medical/surgical areas of special focus include the Family Birth Center, pediatrics, Neuroscience Center, geriatrics, orthopedics, emergency services and more. St. Mary's is affiliated with the University of Wisconsin School of Medicine's three-year family practice residency program. Since 1912, St. Mary's has provided service to much of south-central Wisconsin including Dane County and 17 other nearby counties. In the growing city of Sun Prairie, northeast of Madison, St. Mary's Emergency Clinic provides services to more than 30,000 residents.

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Req # 18007508