



United Way  
of South Hampton Roads

**We bring people and resources together to solve problems too big for any of us to solve alone.**

**UNITED WAY OF SOUTH HAMPTON ROADS  
(REMOTE POSITION)**

<b>Title:</b>	CRM Database Manager (\$50,000 - \$60,000)
<b>Department:</b>	Resource Development
<b>Report To:</b>	Director of Corporate & Community Relationships
<b>Date Created:</b>	October 2023

**Why Work for United Way:**

Do you want to leave work every day knowing that you have made an impact? At United Way of South Hampton Roads (UWSHR), you'll work in a fun and supportive environment where every day is a new opportunity to make a difference. If you talk to our employees, the single trait we all have in common is passion. We work hard because we love what we do and we know how much our community needs us. You'll learn from some of the best in the business and be constantly challenged in an ever-changing industry. Plus, we offer excellent benefits and opportunities for advancement. If you want to be great while doing good, join the United Way team.

**Objectives & Expectations:**

Constituent Relationship Management (CRM) is a multifaceted relationship model (including people, processes, and technology) designed to build relationships with constituents that will result in increased engagement, commitment, and resources. The CRM Database Manager will assist staff in fully engaging in CRM through data collection; information sharing; flawless customer service; growing and deepening relationships with constituents; and surfacing opportunities in a timely manner to build strategies that will increase resources. This position requires administrative, strategic, finance, and technical competencies. It will be responsible for bridging the Finance and Fundraising departments. Duties require software proficiency, initiative, judgment, knowledge of donor accounts, as well as handling matters of a highly confidential nature that require comprehensive knowledge of organizational policies, practices, and procedures.

**Cultural Competence:**

The CRM Database Manager adapts a lens of cultural competency that conveys empathy, support, and an understanding of the people with whom they work (both internally and externally), unite, and serve. This competency helps to build trust and effective engagement, cultivate stronger relationships, expand our organization's reach, and more effectively and respectfully connect with people regardless of background.

**Competencies:**

- Mission-Focused: Catalyzes others' commitment to mission to create real social change that leads to better lives and healthier communities
- Relationship-Oriented: Is astute in cultivating and managing relationships toward a common goal
- Collaborator: Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement
- Results-Driven: Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact
- Strength of Character: Demonstrates ability to be approachable and cooperative while also being a successful executive leader



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- **Brand Steward:** Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network
- **Visionary:** Confronts the complex realities of the environment and simultaneously maintains faith in a different and better future, providing purpose, direction, and motivation
- **Team-Builder:** First ensures that the right people are in the right roles at the right times; fostering commitment, trust, and collaboration among multi-cultural leaders and stakeholders
- **Outward Turning:** Understands the dynamics of local, regional, and national environments, and works on an agenda rooted in the community's own perception of its needs and aspirations
- **Business Acumen:** Possesses a high-level of broad business and management skills and is effective at using financial resources wisely and for the greatest impact
- **Network-Oriented:** Values the power of networks; striving to leverage United Way's breadth of community presence, relationships, and strategy

### **Core Values:**

- **We are responsive** to each other and to the community. We do our best to anticipate challenges and needs so we can proactively address them. We do NOT react, we respond – promptly, appropriately, and thoughtfully.
- **We build trust** by being transparent, authentic, and vulnerable. We communicate openly and listen with respect and empathy. We do NOT shy away from tough conversations or backtrack on our commitments.
- **We are determined** and steadfast in our commitment to our goals. We are persistent and tenacious and seek creative solutions to overcome obstacles. We do NOT let failure keep us down – we brush it off and try again with renewed dedication the next day.
- **We are team players**, always seeking opportunities to go above and beyond our job description to help our colleagues and partners. We aim to create a positive, fun environment where we are proud to be ourselves. We do NOT work in silos, but instead play to each other's strengths and cover each other's blind spots.
- **We care about community** because to us, this work is personal. It's for our families, our neighbors, our children, our friends. We are all here because we want our work to matter – to have some higher purpose – and we want to surround ourselves with others who desire the same. It's NOT just a paycheck, it's a purpose.

### **Job Responsibilities:**

- Develop and sustain a shared mindset among staff (through training, performance standards, and accountability) that constituent needs and preferences should drive organizational strategy at all levels
- Require that data, observations, and activities that come out of every contact by all staff are captured, known, and shared prior to the next contact by utilizing the CRM database
- Identify, develop, and implement strategies to increase constituent support based on data garnered from the system
- Develop processes to capture complete, accurate, and accessible data
- Engage and hold staff accountable to the process protocols and objectives established for capturing, managing, sharing, and leveraging data
- Work with Finance Team to
  - Map processes between CRM and QuickBooks
  - Maintain deposit batches in CRM and send updates to fundraising staff



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- Reconcile pledges and payments between QuickBooks and CRM
- Create custom queries and pull reports for monthly financials
- Produce source documentation for external audits
- Identify and mitigate gaps in processes between Finance and Fundraising
- Cross train staff on CRM system
- Work with Fundraising Team to build reports
  - Goal setting and goal tracking
  - Outreach metric tracking
  - Customized donor reports and dashboards
  - Wealth screens
  - Prep data and materials for org. retreats
  - Support fundraising staff in other ways as needed for large events, campaigns, etc.
- Upload annual opportunities in CRM
- Assemble, create, and format annual DB2 report for submission to UWW
- Manage data quality
  - Redundancy/duplication correction
  - Contact creation and updating
  - List building and advanced finds
- Lead CRM best practices and professional development
  - CRM training/onboarding for new development staff
  - Work with technology vendors and internal staff to implement new features
  - Ensure best practices around stewardship, reporting and acknowledgement
  - Track internal staff use of CRM moves management
  - Work cross-departmentally to ensure all relevant data is captured

### **Essential Duties & Responsibilities:**

- Demonstrate excellent customer service, follow through, and courtesy
- Analytical and creative problem-solving skills
- Self-starter with the ability to work with minimum supervision
- Use of excellent verbal and written communication
- Editing skills and consistent error-free work
- Proficient in Microsoft Office Software applications, CRM experience
- Very comfortable with data and spreadsheets
- Demonstrate ability to work cross functionally as part of a team to accomplish individual and mutually defined goals
- Prioritize work and successfully handle multiple tasks
- Prepare/process documents, forms, templates, and reports, including proofreading and editing

### **Key Skill Requirements:**

- Bachelor's Degree preferred
- Strong customer service
- Proficient computer skills with CRM experience required
- Must be organized and task oriented to ensure deadlines are met
- Microsoft Office and software development skills experience required



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### **Commitment to Equity, Diversity & Inclusion:**

**We take** the broadest possible view of diversity.

**We value** the visible and invisible qualities that make you who you are.

**We welcome** that every person brings a unique perspective and experience to advance our mission and progress our fight for the health, education, and financial stability of every person in every community.

**We believe** that each United Way community member, donor, volunteer, advocate, and employee must have equal access to solving community problems.

**We strive** to include diversity, equity, and inclusion practices at the center of our daily work.

**We commit** to using these practices for our business and our communities.

### **Working Environment:**

- Typical office environment with some time spent in meetings. Nights and weekends may be required for special events or meetings.
- The worker is subject to a variety of inside environmental conditions that may occur in an office, a private home, or elsewhere in the community including temperature variations, unpleasant odors, and potential allergens.
- Although inside work is the standard, it is required that the individual be able to travel and may be exposed to a variety of weather conditions.



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### **Why is United Way of South Hampton Roads a Great Place to Work?**

- 37.5-hour work week (occasional evenings or weekends may be required)
- Remote Mondays and Fridays
- Flexible and compressed schedule opportunities
- Competitive pay
- 403(b) retirement match up to 11%
- Health and dental insurance – employer pays 80% for employees/74% for dependents
- Health Savings Account or Flexible Spending Account

### **Other employer-paid benefits:**

- Short-term and long-term disability insurance
- Cell phone stipend
- Term life insurance
- 18 days PTO the first year of employment
- 11 federal holidays
- Parental leave up to 12 weeks
- Tuition reimbursement
- Mileage reimbursement (IRS rate)
- 4 hours per month for personal appointments (doctor, dentist, legal, etc.)
- Volunteer policy (up to 8 hours per year)
- Bereavement leave
- Jury duty leave
- Quarterly staff social events
- Professional development opportunities
- And so much more!

Interested? Please send your cover letter and resume to [recruiting@unitedwayshr.org](mailto:recruiting@unitedwayshr.org). We will continue accepting applications until the position is filled.

*United Way of South Hampton Roads is an Equal Opportunity Employer. In order to provide equal employment and advancement opportunities to all individuals, employment decisions at UWSHR will be based on merit, qualifications, and abilities. UWSHR does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, age, disability, sexual orientation, gender identity, veteran status or genetics. Please Note: Requirements, skills, and abilities described above are representative of those that must be met by an employee to successfully perform the essential functions of this position with or without reasonable accommodation. In no instance, however, should the duties, responsibilities, and requirements be interpreted as all-inclusive.*