Database Manager

Reports to: Development Director
Position Type: Full-Time, Exempt
Location: New York, NY 10017 / Potential remote flexibility

Currently, IPF staff are working remotely due to the COVID-19 pandemic, at least through March 31, 2021. During the pandemic, this position may require periodic work in our New York office. Once normal routines are safe to resume, this position requires a minimum of a bi-monthly presence in the New York office.

BACKGROUND

Israel Policy Forum is an educational and policy organization working to shape the discourse and mobilize support among American Jewish leaders and U.S. policymakers for the realization of a viable two-state solution consistent with Israel's security. We do this by educating political and communal leaders on pragmatic policy ideas to improve Israel's security while maintaining conditions for an eventual two-state solution, and by building consensus in the policy and Jewish communities for these visions and goals. We envision a Jewish, democratic, and secure Israel, and support a strong and enduring U.S.-Israel relationship.

POSITION SUMMARY

Under the guidance of the Development Director, the Database Manager is responsible for maintaining the integrity and accuracy of Israel Policy Forum's constituent and donor database, housed in Salesforce.

The Database Manager will play a pivotal role across the organization, working closely with team members to keep records updated and accurate, assist with Salesforce automated communication functions, manage configuration, create and run reports for staff, provide support on Salesforce campaigns and outreach, and work with colleagues to develop strategies to leverage data and lists across all aspects of Israel Policy Forum's work, including communal engagement, young professionals, etc.

This position coordinates database maintenance and access for all of Israel Policy Forum's departments, as well as develops and delivers training to ensure all staff can access and update database records. The Database Manager will field and prioritize data requests, produce high quality reports and lists, manage fundraising event data, manage data flow between Salesforce and other applications (including Salesforce NonProfit Success Pack, MailChimp, Campaign Monitor, iWave, Soapbox, Zoom, etc.), develop highly customized donation and solicitation tracking documents for board members and senior staff, and coordinate the gift entry and acknowledgement process.

The successful candidate will have meticulous attention to detail and act in an energetic, ambitious, goal-oriented, and creative manner. The candidate will have the ability to work both
independently and collaboratively and will also have a talent for organizing and strategically building infrastructure.

RESPONSIBILITIES

Database Management

- Update and maintain constituent and donor records in the Israel Policy Forum database, with a particular eye toward eliminating duplicate records created by Campaign Monitor.
- Customize and configure Salesforce, including maintaining security protocols, user permissions, workflows, notifications, and business process automations.
- Organize and maintain organizational reporting and dashboards in Salesforce and assist users in developing their own reports, particularly tracking gift solicitations by our Board of Directors and senior staff, regularly updating and maintaining individual tracking information.
- Run, distribute, and design weekly, monthly, quarterly, and annual reports from the database, performing ad-hoc reporting as requested to assist in the acquisition, renewal, stewardship, recognition, and annual recaps of individual, event, and foundation giving.
- Work closely with the Finance Department to ensure that all donor revenue in the database is reconciled with accounting software (Quickbooks Online).
- Design and implement data hygiene practices that ensure the accuracy of donor tracking, including individual, corporate, event, and foundational giving, while maintaining confidentiality of all donor information. Complete regular internal system audits and prepare for and manage system upgrades, stay current on Salesforce trends, progress and best practices.
- Diagnose and correct system issues, either independently or with technical support from software providers and outside consultants as needed. Manage integration of data between Salesforce and other platforms and trouble-shoot when synchronization issues arise.
- Administer, maintain, and optimize Salesforce platform-connected apps and tools. Manage data feeds and other integrations.
- Liaise between staff users and internal and external teams for Salesforce projects. Train new and existing staff and interns on effective database use.
- In coordination with the Director of Finance and Administration, manage relationships with vendor account representatives, including Salesforce, MailChimp, Campaign Monitor, iWave, Soapbox, Zoom, etc.
- Stay up-to-date on current Salesforce applications and recommend changes and upgrades as necessary.
• Manage gift entry and acknowledgement processes, pledge reminders, and invoices.

Event Support

• Create event registration and donation forms using Salesforce-connected apps, including NonProfit Success Pack, Soapbox, etc.
• Track and manage fundraising event data, including guest registration information, VIP list management, and associated giving.
• Develop schedule for wealth screening of event attendees and integrate information in Salesforce.

Miscellaneous

• Pull segmented lists for direct mail appeals and coordinate with the Communications Department.
• Track and report on results from direct appeal efforts.
• Work with the Finance Department to manage Accounts Receivable (A/R), ensuring that outstanding giving and pledge giving are followed up on promptly and accurately.
• Work with the Development Director to ensure grant application and reporting procedures are properly captured in Salesforce.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

• A successful candidate must have a “can do” attitude, enjoy learning new skills and stretching, thrive in a fast-paced environment, be highly organized without losing sight of larger objectives, and be committed to a Jewish, democratic, and secure Israel.
• The qualified individual must pay exceedingly close attention to detail, have excellent judgment, and have the ability to work in a changing environment. The ability to work on multiple projects simultaneously and prioritize appropriately is a must.
• Demonstrated record of success in managing large databases or CRMs, ideally in a nonprofit setting.
• Knowledge of cultivation, solicitation, and stewardship strategies and techniques, particularly around individual and foundation fundraising techniques.
• Self-motivation and discipline, able to regularly set and achieve work goals.
• Excellent organizational, interpersonal, and networking skills with teams, as well as with individuals.
• Ability to maintain a high level of poise and professionalism in all circumstances.
Ability to initiate and build relationships with a range of constituents, from colleagues, to vendors, to donors, interacting via telephone, in writing, and in person as well as virtually through Slack, Zoom, and email.

Demonstrated ability to take primary responsibility for a diverse number of projects and to complete them in a timely manner with limited supervision.

Ability to work collaboratively in a team setting.

Ability to work occasional nights and weekends, as needed.

Willingness to perform administrative functions as needed, such as scheduling meetings/travel, tracking correspondence, and routine constituent interaction.

Ability to work from a fully-connected home office during the COVID-19 pandemic.

EDUCATION AND EXPERIENCE

A bachelor’s degree or equivalent experience and minimum 2-3 years in database management.

Excellent oral and written communication skills.

Experience as a Salesforce administrator, preferably in a nonprofit setting with direct NPSP experience. Strong understanding of the platform, with the ability to build custom Lightning apps and objects, formula fields, workflows, custom views, and other content.

Strong understanding of Salesforce best practices and functionality.

Experience with Google Suite and Microsoft Office suite, especially Outlook, Excel, and Word; experience with project management tools such as Asana; and comfort with Slack.

This is a full-time, exempt position, with very occasional evening or weekend work if needed. The annual salary range is $60,000-$65,000 depending on experience. Benefits include generous paid time off; health, dental and vision benefits; and a 401(K) match.

Israel Policy Forum is an equal opportunity employer. We consider applications for all positions without regard to race, color, religion, creed, gender, national origin, age, disability, marital or veteran status, sexual orientation, or any other legally protected status.

Please submit a resume and cover letter stating why you want to work at Israel Policy Forum to Lissie Diringer at databasemanager@ipforum.org with “Database Manager” in the subject line.