CRM Programmer/Analyst and Senior Prospect Researcher
CRM and Data Services | College Advancement

Position Summary
CRM Programmer/Analyst: Reports to Director of CRM and Data Services and serves as liaison between Office of College Advancement (OCA) and the CRM and Data Services team. Responsibilities include improving college advancement CRM data and business processes through technical innovation, configuration and programming of software components, along with strengthening and extending the data architecture for the college. Identified objectives will be carried out through a combination of individual contribution, student team management, and cross-team collaboration. Works with Director of CRM and Data Services, Sr. Analysts and business stakeholders to identify most urgent and relevant data needs, analyze business processes to make recommendations for improvement, develop technical requirements, and implement solutions.

Senior Prospect Researcher: Reports to the Vice President for College Advancement and is a member of the Advancement senior leadership team. The Senior Prospect Researcher applies advanced and innovative research techniques to provide high-level description and analysis on individuals, corporations and foundations (including current and prospective donors, as well as extended individual and organizational relationships) using a wide variety of biographical, organizational, anecdotal and financial sources. The position draws upon multiple resources to assess financial capacity, philanthropic tendencies, giving propensity, and connections with Westmont College with the goal of generating new donations and fostering strategically important relationships to the College.

Qualifications: Demonstrated proficiency in verbal and written communication; proficiency in database design, improving data at scale; reporting across many data tables; understanding of software requirements, architecture, development and debugging, and cloud object-oriented design. Extensive research and analysis skills specific to the higher education fundraising and major gift fundraising fundamentals. Candidate must have effective interpersonal skills, the ability to work well with others in a team setting, and to multi-task among various assignments and projects. Personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations required.

Demonstrated and desired experiences:
- Experience in advancement department operations, with specific experience in prospect research, gift processing, and major gift and deferred giving officer relationship management.
- Ability to analyze and synthesize data from a wide variety of sources, and present the resulting information in a clear, concise summary.
Proficiency in Internet research and data extraction, including fundraising databases, online services, and wealth screening analysis.

Ability to organize and manage a diverse range of assignments and projects with high efficiency, yet thorough attention to detail and follow through.

Proven ability to translate business process requirements into technical requirements.

Salesforce (SFDC) software engineering skills, with particular expertise in working with Salesforce’s proprietary reporting tool: CRM Analytics.

Salesforce Administration experience, certification preferred.

Knowledge of relational databases (SOQL, SQL, MySQL), data modeling, ETL tools, code versioning tools (GitHub, BitBucket), and project management tools.

Desire to work with the latest tools, technologies, and methodologies.

**Responsibilities:**

- Work with Director of CRM and Data Services to ensure all new project development activity is in alignment with enterprise CRM project plan and Advancement objectives.
- Provide giving reports and dashboards to executive leadership and other staff within office of college advancement.
- Document and maintain business process knowledge base for OCA staff.
- Gatekeeper for industry standard Advancement metrics, including those reported externally.
- Understand, document, and propose solutions for departmental business process pain points, beginning with Advancement, but expanding to other departments as necessary.
- Assist in the management of CATLab students to achieve data and business process related goals, especially benefiting advancement operations. (Examples include organizing, training and overseeing student projects to acquire and improve data quality of constituents.)
- Conduct in-depth prospect research for corporations, foundations, and individual major gift prospects; analyzes, interprets, and evaluates biographical, business, personal, and financial information for current and prospective donors. Produces clear and concise research reports.
- Proactively reviews donor prospect assignments to ensure movement and solicitation strategy in relationship to capacity and affinity. Maps relationships between donors and prospects to help identify opportunities and build major gifts pipeline. Analyzes wealth screening data to identify new donor prospects.
- Prepares high quality profiles and strategic briefings for the President and Vice President on prospects and/or groups of prospects for Development staff and executive leadership, in advance of calls and events in order to obtain optimal outcomes.
- Provides primary oversight and management of prospect assignment.
- Expectations for workplace demeanor include but are not limited to: working collaboratively and harmoniously with co-workers, customers and others by sharing ideas and resources willingly, constructively and positively; listening to and objectively and respectfully considering the ideas and perspectives of others; readily admitting and
correcting personal mistakes; meeting commitments; keeping your supervisor and others who may be affected informed about work progress; addressing problems willingly and constructively to discover practical and lasting solutions acceptable to all parties; working promptly toward reconciliation and forgiveness during conflict; respecting the diversity of our community in words and deeds. Westmont expects employees to avail themselves wherever necessary, demonstrating flexibility and openness to new requests and responsibilities in order to foster an environment of collaboration.

- Other duties as assigned.

**Reports to:** Director of CRM and Data Services and Vice President for College Advancement and CIO

**Pay Range:** $66,500-$74,800/year