



# HOLY FAMILY

## CATHOLIC HIGH SCHOOL

### Holy Family Catholic High School Position Description

#### Job Title: Development Data Analyst

**FLSA:** Exempt-Professional

**Reports to:** Lead Development Officer

**Takes Work Direction from:** Lead Development Officer, President

**Department:** Development

**Date:** February 2024

**Purpose of the Position:** The Development Data Analyst supports the Development Team through constituent management, analysis, reporting, prospect research, growth and expansion around donor relationships and stewardship. This position is responsible for gathering, analyzing, and managing information to help inform strategy and advance Holy Family's development program outcomes.

The Development Data Analyst serves as a project manager and prospect researcher experienced in data management, data integrity, production, analysis, tracking, project management, campaigns, customer service and research deliverables, as well as in determining/advising prospect strategy in coordination with the development team. This position is responsible for processing gifts, updating constituent records, preparing acknowledgement letters, generating mailing lists, recording pledges and maintaining donor reports through Raiser's Edge. This position is also responsible for managing and implementing the donor acknowledgement system and creating needed policies.

This is a year-round, full-time position without supervisory responsibilities.

#### **Mission Expectations:**

- Believe in and contribute to Holy Family Catholic High School mission and organizational goals.
- Support and animate Holy Family's Catholic Lasallian identity.
- Develop positive relationships with Holy Family community.
- Support student activities through attendance and acknowledgement of participation as possible.
- Support the school, its mission, and its leadership.

#### **Essential Performance Functions:**

##### ***Database Maintenance, Management, Planning and Reporting***

- Develop and manage efficient systems for the data entry process to ensure that accurate, updated, and relevant information on donors and for prospective donors, is maintained and secured within the Raiser's Edge (RE) database
- Identify areas of possible improved database usability and efficiency, and execute solutions
- Manage and input gift and pledge entries, tracking and fulfillment
- Conduct ongoing quality checks on data to improve data integrity including but not limited to verification of constituent information, updating addresses, deceased records, etc.
- Produce standard and custom reports to assist with donor management and donation tracking
- Build queries and exports for segmented mailing lists for appeals, events and other tactics

- Document processes for automated and on-demand reports
- Generate regular and ad hoc reports for the development program
- Interact with internal department team members to understand and translate their reporting requirements
- Create and generate various financial/fundraising reports and dashboards for the development program
- Serve as the school's Raiser's Edge liaison with the technology department, business office, and with Blackbaud and other related software vendors
- Coordinate with appropriate school personnel to perform Raiser's Edge database maintenance, global updates, and integration with Education Edge/CORE on a regular basis

### ***Constituent Management and Acknowledgement***

- Design and implement database queries in response to requests for information providing timely and accurate records, reports, and lists
- Provide counsel regarding strategy, cultivation, solicitation and stewardship for all donor strategies ranging from annual to major
- Participate in annual and major gift prospect strategy meetings with development officers to support coordinated and updated strategies
- Execute a variety of prospect management services including, but not limited to, prospecting and major gift portfolio development, portfolio management, portfolio analysis and review, pipeline management, prospect management processes and data management
- Provide guidance for pipeline development and growth
- Manage gift recognition process, including those that are hand-written, electronic, and verbal
- Create and maintain policies for gift acceptance, gift counting and naming

### ***Research and Analysis***

- Analyze data to proactively identify trends or opportunities
- Engage development officers in proactive prospect identification and qualification
- Research those engaging with Holy Family for philanthropic purposes, using a variety of sources
- Conduct constituent segmentation and prospect research to maximize fundraising outreach and results
- Develop reporting and analytical tools that provide relevant and timely data to identify trends and metrics that help to support the department's initiatives
- Identify, evaluate and prioritize potential donors using database queries and analysis aligned with tactics and department goals
- Analyze data and synthesize research results to assess financial capacity, philanthropic tendencies, giving propensity, affinities and other information to aid in the development process
- Perform complex data modeling, analyses, list segmentation and reporting in support of fundraising and engagement efforts
- Combine data from numerous enterprise and 3rd party systems and load into analytic software to provide the most accurate and useful lists for marketing efforts

### **Other Performance and Professional Expectations:**

- Become familiar with trends in private high school development programs and apply learnings, as appropriate
- Contribute to discussions around strategy planning, goal setting and best practices
- Research and explore new products and methods to improve data quality and reporting
- Assist with Development fundraising events as needed

- Collaborate and effectively communicate with all other campus constituencies including but not limited to faculty, student life, athletics, facilities, business/finance, and information technology to ensure the success of each event and the attainment of institutional fundraising goals
- Exhibit sound judgment and maintain confidentiality of sensitive information
- Uphold Holy Family's standards for professionalism, leadership, and personal responsibility acting as ambassador within and outside of the institution
- Attend and participate in leadership and staff retreats and meetings
- Be present where needed, when needed, and ready to work as needed
- Perform other duties as assigned
- Abide by all school policies outlined in the Employee Handbook

### **Competencies:**

- Continuous Learner - Ability to continually develop and improve one's skill and knowledge to perform effectively and adapt to change in the workplace - development occurs through a variety of learning opportunities, seeking feedback, and individual reflection
- Personally Effective - Making use of all the personal resources at one's disposal (talents, skills, energy, and time) to achieve goals
- Tenacious and Results-driven - Setting high goals for self and others in pursuit of accomplishing objectives by effectively working through challenges and demonstrating commitment to Holy Family's goals
- Creative Problem Solver - Focused on improving one's practices and results by being open to new ideas and maximizing available resources.
- Effective Communicator - Conveys information in a way that is strategic, honest, timely, and respectful
- Strong Culture Builder - Builds and supports a strong positive culture through behaviors and actions that align with Holy Family's core values
- Collaborative Partner - Works effectively with others to achieve shared goals through cooperation, sharing knowledge, joint problem-solving, and celebrating success

### **Qualifications:**

- Bachelor's degree
- Experience with The Raiser's Edge Fundraising and Donor Management System, specifically Raiser's Edge NXT and Connect Raiser's Edge - high level proficiency preferred
- Two-to-four years work experience (preferably in a development department) involving data entry, database management, financial data and report generation
- Experience demonstrating a high degree of accuracy in data entry and generating reports
- A strong sense of fundraising ethics and practices, and respect for confidentiality of donor information.

### **Knowledge, Skills and Abilities Required:**

- Understanding of and a passion for the Holy Family mission
- Excellent written and verbal communication skills
- Proficiency in Microsoft Office and Google Workplace applications
- Ability to cooperate as a team member with colleagues to meet institutional goals
- Demonstrated ability to work collaboratively
- Flexibility to occasionally work long hours, including attendance at weekend and evening events
- Detail oriented and excellent time management skills
- Ability to multitask, prioritize and follow through on a variety of concurrent projects
- Ability to interact with a variety of individuals in a professional, courteous, and tactful manner.
- Ability to obtain and maintain a valid driver's license
- Remain in compliance with Virtus requirements
- Ability to pass a background check upon hire and periodically throughout the course of employment

**Mental & Physical Demands:**

- Use of computer for long periods of time
- Occasional evening or weekend events/meetings and travel
- Reliable personal transportation
- General lifting requirement: 40 pounds or fewer