



## **Data & Records Coordinator**

Full-time, Salaried, Administrative Support

### **Position Summary:**

The Data & Records Coordinator is an essential role that directly supports the Center's goal of maintaining fundraising and donor data. This position works closely with finance, grants, and fundraising teams to ensure accuracy in the Salesforce database. The Data & Records Coordinator reports to the Director of Development & Communications. This position has an option to work from home after 60 days from hire on a limited basis and requires supervisor approval.

### **Qualifications:**

- Bachelor's degree in data analysis, finance, and business/administrative management preferred. Associates degree with experience considered.
- Minimum one year of experience in data entry, reporting and management..
- Basic accounting skills desired, but not required for this position.
- Exceptional organizational and critical thinking skills.
- Commitment to detail and accuracy.
- Strong written and verbal/oral communication and interpersonal skills and ability to work effectively with others as part of a team.
- Ability to address conflict and problem solve.
- Flexibility and ability to handle stress and new or undefined situations.
- Ability to develop rapport with people of all ages, backgrounds, and economic resources, and to treat others in a friendly, courteous, and appreciative manner.
- Ability to work with minimal supervision, take initiative, and prioritize multiple projects and tasks with changing priorities.
- Computer skills, including experience with Google, Microsoft Office Suite, Salesforce (or other database) and Google Drive, and/or ability to learn new software and systems.
- Ability to maintain confidentiality concerning volunteers, clients, students, children, and staff or agency business.
- Commitment to the CMC mission and the values of the Sisters of Mercy.

### **Responsibilities:**

- Support the tracking of grant status and submissions, including ensuring all supporting documentation is submitted and received (and reflected in data systems).
- Ensure data, program information, and reports are available in a timely manner to fulfill contracts, grants and other funding requirements.
- Provide for proper and complete tracking, reporting of grants and required program designations and data.
- Support monitoring and site visits, as well as the annual audit by gathering and organizing required documentation.
- Support the grants manager with grant reporting, progress reports, expense and

receivable tracking, and reimbursement process

- Aggregate grant payment data on a monthly basis and donor data on a yearly basis.
- Collect and distribute daily incoming mail and secure donations until they are processed and tracked in Salesforce.
- Manage deposit process including collecting and tracking donations and grant payments received via digital portals.
- Prepare and process acknowledgment letters including memorials and pledge reminders.
- Create Salesforce reports and prepare mailing lists for appeals and other mailings.
- Provide for data accuracy and support the integrity of the database through regular monitoring.
- Ensure donations and grant payments are current, accurate and reconciled monthly.
- Support Salesforce user adoption for accurate documentation.

### **General Agency Duties**

- Be able to explain CMC program information to students, clients, residents, volunteers and others in the community.
- Present a positive image of the Center and its programs.
- Provide direction, guidance and support to volunteers and interns as relevant to the role, foster relationships with, and show appreciation for volunteers with whom you are in direct contact.
- Assist with CMC fundraising efforts and serve on event committees as needed.
- Maintain clean and organized facilities including the storage and archives.
- Assist with the shared staff responsibilities for security of the clients/volunteers and building.
- Perform other duties as requested/assigned.

### **Physical Work Requirements**

- While performing the duties of this job, the employee is regularly required to talk and hear.
- The employee regularly is required to stand, walk, sit for extended periods of time, work at a computer, and engage in repetitive hand and/or wrist movements.
- The employee occasionally lifts and/or moves up to 40 lbs.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Date established: 8/2021; 2/2023 Revised 6/2023; Revised 3/2024