



## ORANGE COUNTY UNITED WAY JOB DESCRIPTION

<b>Job Title:</b> Donor Database Manager	<b>Reporting To:</b> Director, Philanthropy Operations
<b>Department:</b> Philanthropy	<b>Position:</b> Full-Time/Exempt

### **Purpose of Position**

The Donor Database Manager will be the primary manager of Orange County United Way's CRM system and will be responsible for ensuring the integrity and accuracy of our donor database. This role is crucial for maintaining effective donor relationships and supporting fundraising efforts. They will be responsible for a range of data management tasks, including ongoing reporting, daily, weekly, and monthly maintenance of CRM profiles, managing records, creating and maintaining dashboards, conducting donor research, and ensuring timely updates based on donor interactions.

The Donor Database Manager will focus primarily on the efficiency and accuracy of our donor database and providing crucial administrative support for donor engagement activities. They will also be responsible for timely communication and logistical support for donor events.

### **Key Duties and Responsibilities**

- Perform daily, weekly, and monthly maintenance on CRM profiles.
- Manage and resolve duplicate profile lists.
- Monitor and complete requests related to updating donor profiles.
- Responsible for acknowledgement letters process segments in CRM database.
- Manage and update coding and flags within CRM database.
- Manage preparation of meeting and event logistics related to CRM database.
- Support post-meeting and post-event data entry and CRM database updating.
- Build and maintain dashboards for tracking the donor experience with Orange County United Way.
- Develop and maintain dashboards for relevant data, including donors, account managers, and communication cadences.
- Maintain and update department projections on key dashboards.
- Perform segmentation updates based on donor progression within the CRM database.
- Conduct donor research and prepare reports on donor engagement, ensuring all information is current in CRM database.
- Other duties as assigned

### **Core Competencies**

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.



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- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **Interpersonal Skills** - Maintains confidentiality; listens to others without interrupting; remains neutral and unbiased; remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly; listens and obtains clarification; responds well to questions; participates in meetings.
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.
- **Language Skills** - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

### Job requirements/Technical Knowledge

- Bachelor's Degree from an accredited university or college preferred.
- A minimum of three - five years of relevant database/CRM management experience.
- Nonprofit experience in working with individual donor, solicitation, engagement and stewardship within Orange County and/or Southern California strongly preferred.
- Comfortable using donor databases and CRMs, prospect research, and wealth screening tools to support donor engagement.
- Skilled at building and maintaining relationships—whether with donors, colleagues, or community partners through empathy, active listening, transparency of intention and positive communication interactions.
- Passionate about the mission of Orange County United Way.
- Willing to travel as needed and attend events, including evenings and weekends.
- Access to reliable transportation.
- Advanced computer skills with emphasis on Microsoft office (Outlook, PowerPoint, Excel, and Word).
- Proficient in using Zoom and Teams. Experience in CRMs required; experience with Andar a plus.

### COMPENSATION

- Commensurate with experience, education, and market \$68,640-\$85,000 per year.
- Competitive benefits.



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### **PHYSICAL DEMANDS**

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.

While performing the duties of this Job, the employee is frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 25 pounds.

### **Send Cover Letter and Resume To:**

[recruiting@unitedwayoc.org](mailto:recruiting@unitedwayoc.org)

Orange County United Way

18012 Mitchell South, Irvine, CA 92614

[www.unitedwayoc.org](http://www.unitedwayoc.org)