

## **CFLEADS POSITION DESCRIPTION**

<b>Title:</b>	Program Associate and Database Manager
<b>Reports to:</b>	Director of Development and Marketing
<b>Location:</b>	Remote/Flexible within the U.S.
<b>Salary:</b>	\$55,000. Benefits are competitive and include health, dental and vision insurance, 401K, and productivity and wellness days.

Submit resume and cover letter describing prior experience to Caroline Merenda, Chief of Staff, at [cmerenda@cfleads.org](mailto:cmerenda@cfleads.org) by March 8 for first review. Submissions will be accepted until position is filled.

### **About CFLeads**

CFLeads is a national network of community foundations working together to build strong communities. As the only national organization exclusively for community foundations, we work with hundreds of community foundations each year that are committed to increasing their local impact through community leadership.

**CFLeads vision:** *Community foundations are vital partners in building communities where all residents are prosperous, healthy, and secure.*

**CFLeads mission:** *CFLeads helps community foundations build strong communities by advancing effective practices, sharing knowledge, and galvanizing action on critical issues of our time.*

### **Position Description**

The Program Associate and Database Manager is responsible for supporting several CFLeads' projects and programs (e.g. Executive Leadership Institutes, Gun Violence Prevention Network) as well as working to optimize the configuration and use of our Salesforce CRM database.

This is an opportunity for a highly organized individual to put his/her/their skills to best use as part of a hard-working and collegial team.

## **Key Responsibilities**

The Program Associate and Database Manager will work closely with CFLeads staff to support the organization's programming and data needs. This job entails research and curating tools and resources for CFLeads constituents. Additionally, this position is responsible for managing the Salesforce technology at CFLeads and being a primary point of contact for the team. This position reports to the Director of Development and Marketing and will split their time into two distinct areas:

### **Program Support / Meeting Coordination (50% of the time)**

- Coordinate logistics and scheduling for internal and external meetings.
- Maintain program calendars and ensure timely reminders and follow-ups for ongoing projects.
- Assist in the development and distribution of program materials, including guides, toolkits, and agendas.
- Draft, format, and compile documents, including meeting materials, participation agreements, grant agreements, contracts, invoices, etc.
- Communicate with meeting participants regarding participation agreements, assignments, and logistics.
- Identify and secure meeting venues, caterers, and AV support for meetings across the U.S.
- Provide **on-site** logistics support and coordination.
- Manage printing, assembling, and shipping of documents.
- Collaborate with program team and departments on task and information sharing and general support.

### **Research / Data / Database Management (50% of the time)**

- Salesforce / CRM administration, including data entry, configuration, support, and oversight.
- Configure settings and update Salesforce content to reflect field segmentation and organizational needs.
- Manage Salesforce configuration changes, including but not limited to flow, fields, page layouts, record types, custom settings, dashboards, and reports.
- Collaborate with all departments to ensure data accuracy and integrity.
- Help develop and provide reports for all departments.
- Collect, monitor, and present important system metrics to stakeholders.
- Collect, track, and update information and data in Salesforce, including but not limited to investors, program attendees, and various types of engagements.
- Create, distribute, and manage surveys and results.
- Make recommendations for and support application integration with Salesforce.

- Responsible for user and license management, user support, and system upgrades.
- With support from the Director of Development and Marketing, document internal database procedures and configuration settings.
- Participate in the Salesforce community and events to stay informed about and influence the platform functions.

**Requirements**

- Minimum of three years of professional experience.
- Event planning/customer service experience.
- Strong data management abilities and attention to detail.
- At least two years of experience working with Salesforce, as an administrator.
- A strong understanding of the Salesforce platform and functionality and a desire to keep learning.
- Ability to travel for work.
- Interest in and enthusiasm for the nonprofit sector and administration/operations.
- Strong interpersonal skills, ability to communicate and manage well at all levels of the organization and with staff at remote locations.
- Must be able to work both independently and as an integral member of various teams.
- Comprehensive knowledge of computer software applications such as MS Office and the ability and desire to learn new technology quickly.

**Key Competencies**

Competency Title	Definition & Key Behaviors
1) <b>Interpersonal Skills / Teamwork</b>	<p>The ability to work well and cooperate with others. This includes:</p> <ul style="list-style-type: none"> <li>▶ Developing and maintaining positive working relationships and interacting collaboratively with others, including those holding opposing views and goals</li> <li>▶ Showing understanding, friendliness, tact, empathy, patience, compassion, mutual trust, and the highest level of respect for others</li> <li>▶ Relating well to people from varied and diverse cultural, racial, ethnic, gender, age, educational, professional, etc. backgrounds</li> </ul>

Competency Title	Definition & Key Behaviors
<b>2) Problem Solving / Decision Making</b>	<p>The ability to analyze and synthesize information and draw appropriate conclusions using best practices and other models of continuous improvement. This includes:</p> <ul style="list-style-type: none"> <li>▶ Clearly defining issues despite incomplete or ambiguous information</li> <li>▶ Generating useful and effective alternative solutions before making decisions</li> <li>▶ Making decisions in a timely manner based on sound logic and rationale</li> </ul>
<b>3) Work Orientation</b>	<p>The ability to make a meaningful contribution to work and ensure that activities and responsibilities are efficiently completed. This includes:</p> <ul style="list-style-type: none"> <li>▶ Taking initiative to complete job assignments accurately and completely</li> <li>▶ Being committed, reliable, trusted, and accountable for completing assignments</li> <li>▶ Regularly and dependably following agreed upon work schedule</li> </ul>
<b>4) Adaptability / Flexibility</b>	<p>The ability and willingness to change one's style or approach in response to differing circumstances or to work in ambiguous situations. This includes:</p> <ul style="list-style-type: none"> <li>▶ Working effectively under stressful conditions</li> <li>▶ Handling unexpected situations in a calm and professional manner</li> <li>▶ Showing resilience under ambiguous, changing, or demanding circumstances</li> <li>▶ Staying updated on new and innovative industry developments.</li> </ul>
<b>5) Planning / Organizing</b>	<p>The ability to set priorities, plan and coordinate work activities, and obtain and manage resources so that work objectives are accomplished on time and within budget using best practices and other models of continuous improvement. This includes:</p> <ul style="list-style-type: none"> <li>▶ Focusing time and energy on areas that have the highest priority</li> <li>▶ Completing assigned tasks within schedule constraints</li> <li>▶ Setting priorities consistent with mission, vision, strategy, and goals</li> </ul>
<b>6) Communication</b>	<p>The ability to communicate clearly and politely in both oral and written formats with coworkers, community leaders, funders, vendors, and other stakeholders. This includes:</p> <ul style="list-style-type: none"> <li>▶ Sharing information openly to optimize individual and organizational effectiveness</li> <li>▶ Targeting the amount, style, and content of information to an audience's needs</li> </ul>

Competency Title	Definition & Key Behaviors
	<ul style="list-style-type: none"> <li>▶ Actively listening to and understanding information and answering questions thoughtfully and completely</li> <li>▶ Composing legible, error-free emails, memoranda, procedures, policies, reports, etc. as required</li> </ul>

CFLeads is an equal-opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, disability, age, sexual orientation, gender identity, national origin, veteran status, or genetic information. CFLeads is committed to providing access, equal opportunity, and reasonable accommodation for individuals with disabilities in employment, its services, programs, and activities. To request reasonable accommodation, contact Caroline Merenda at [cmerenda@cflleads.org](mailto:cmerenda@cflleads.org).