The Boston Foundation believes that one of the great strengths of the Greater Boston community is the rich diversity of its residents in race, religion, national origin, ethnicity, sex, sexual orientation, gender identity, genetic information, age and physical abilities. The Foundation seeks to enhance and support that diversity, not only by its grant making, but also by adopting and implementing employment policies and practices designed to recognize and respond to such diversity.

The Boston Foundation is an Equal Opportunity Employer. We encourage applications from people with diverse backgrounds and experience.

All applications should be submitted online. Go to [https://www.tbf.org/who-we-are/careers](https://www.tbf.org/who-we-are/careers) and select “Data and Research Associate” to complete our online application process.

**Job Description**

**Title:** Data and Research Associate  
**Department:** Philanthropy Group  
**Reports To:** Research, Reporting & Data Manager and Associate VP, Philanthropic Operations  
**FLSA Classification:** Exempt  
**FTE:** 1  
**Supervises:** None  
**Hybrid Schedule (subject to change):** On-site Tuesdays and Thursdays. Remote on Mondays, Wednesdays, and Fridays  
**Position Budgeted:** $50,000 to $55,000  

**Position Summary:**  
The Data and Research Associate will work to enhance the Development and Donor Services team’s capacity for data integrity, analysis, and research. This individual will monitor and maintain the accuracy and consistency of constituent and activity data entered into the Salesforce database. They will also be responsible for developing reports for a wide variety of stakeholders across the team. In addition, the Data and Research Associate will hold the primary research function for the team, conducting in-depth research on donors and prospects to support cultivation and prospecting efforts.

**Essential Functions:**
Monitor weekly, monthly, quarterly, and ad hoc reports and dashboards in Salesforce to support data integrity and consistency related to donor and prospect activities, gifts, and grants;
Regularly enter, update and clean constituent records in Salesforce;
Work closely with the IT team to identify and resolve duplicate records;
Serve as a key departmental resource for the Salesforce database and various data entry and reporting needs;
Help monitor and maintain knowledge documentation used to document essential team processes;
Conduct research and create briefings on individuals and organizations to support donor stewardship as well as prospect identification and qualification;
Participate in the implementation of new technology solutions, such as email marketing and event management tools;
Work as a liaison with the communications team to develop eblast lists for departmental emails;
Provide technical and administrative support for events, including assisting with occasional events in the mornings (prior to 9:00am) and evenings (after 5:00pm); and
Provide general administrative support to other department team members as requested.

Other Duties and Responsibilities:
• Individuals assigned to this position may perform other duties as assigned.

Qualifications

Preparation, Knowledge, Previous Experience:
• College degree or equivalent experience; and
• At least 1 year of office-based administrative work experience.

Skills, Abilities, Competencies:
• Excellent written and verbal communication skills;
• Strong customer service orientation;
• Strong knowledge of Microsoft Office products including proficiency in Excel, running and creating functions, pivot tables and charts strongly preferred;
• CRM database experience (Salesforce strongly preferred);
• Professional and mature interpersonal work style, ability to interact well with a diverse range of people;
• Knowledge and experience in working with diverse communities of Boston;
• Strong organizational skills and attention to detail;
• Ability to adjust work activity to various management styles;
• Ability to make decisions regarding organizing own workload and managing multiple tasks with unique timelines;
• Must be collaborative, proactive and able to create and implement new systems;
• Participatory work style; team player and sense of humor; ability to give and
receive feedback;

- Strong goal orientation with flexibility to adapt to changing priorities; and
- Willingness and ability to handle confidential information.

**Working Conditions & Physical Demands:**

- Ability to sit for long periods of time;
- Ability to use a keyboard for extended periods of time.

The content is intended to describe the general nature and level of work being performed by persons assigned to this job. It is not intended to constitute an exhaustive list of all responsibilities and duties required.

External and internal applicants, as well as position incumbents, who are or become disabled as defined under the Americans with Disabilities Act or applicable state law, must be able to perform the essential functions of the job (including those listed above) either with or without reasonable accommodation. Reasonable accommodation, if any, will be determined by management in consultation with the employee on a case-by-case basis.

This job description is intended to be general and may be revised from time to time. At management’s discretion, the employee may be assigned different or additional duties from time to time.

8-2023