



PEAK Grantmaking

Practice meets purpose

Membership Operations Specialist Position Description

Summary

As PEAK Grantmaking's membership continues to grow, we need a high-level administrator of the membership databases. This position will implement data integrity efforts, data management, database setup, and reporting efforts for the entire organization. This position will also support all daily activities and operations of the membership department and be involved in member recruitment, retention, and engagement efforts. The Membership Operations Specialist reports to the Membership Director.

Key Position Focus Areas

Database Integrity and Data Management
Membership Operations and Reporting
Member Retention and Engagement

Duties, Responsibilities, and Authority

- Maintain expert level of proficiency in NetForum Pro and Zoho use. Train staff and members in NetForum Pro and Zoho functions, reports, and processes.
- Maintain and input accurate membership, financial, and attendance records.
- Coordinate data input, integrity, and verification efforts.
- Ensure data integrity by updating records/profiles, upgrading membership information, and analyzing quarterly data on new memberships, billing, and status changes.
- Qualify prospects, process new member applications, and enter dues payments in a timely and accurate manner.
- Promptly and efficiently handle member and customer questions, concerns, and requests for information via phone and email. Build positive relationships with PEAK Grantmaking members. Coordinate with staff across the organization to promptly and positively resolve member issues.
- Maintain NetForum accounting entry of purchases and refunds. Process sales, checks/credit cards, and refund transactions that include but are not limited to membership applications, sponsorships, conference registrations, and other product orders. Identify inconsistent transactions and coordinate with Membership Director and/or COO to resolve.
- Support outreach to members and potential members (expired memberships, upcoming events, updates to contact information, etc.) to support membership renewal, regional chapter, and registration efforts.
- Design, analyze, and generate monthly reports on membership and quarterly engagement activity.
- Research and manage email bounce backs and canceled member records, and update the database accordingly with new and updated member information.

- Develop and run membership reports as needed to verify/check accuracy of data entry and data across NetForum Pro (membership database) and Zoho (CRM database).
- Enter prospects and assist with recruitment activities related to the annual growth campaign.
- Record and track volunteers at national level and volunteer data, including monitoring and processing updates and generating reports as needed.
- Maintain and enhance PEAK Grantmaking membership department's standard operating procedures (SOP). Coordinate with staff across the organization to ensure SOP adoption and functionality.
- Assist with annual volunteer recognition activities including preparing documents, generating data files, and coordinating mailings.
- Providing logistical and meeting planning support for PEAK Grantmaking meetings.
- Analyze member exit surveys and generate customer service report statistics.
- Incorporate diversity, equity, and inclusion (DEI) into work assignments and department efforts and also work to build personal knowledge and experience.
- Work to actively identify and address organizational issues and opportunities. Other duties as assigned.

Requirements and Qualifications

- Knowledge of association database management with experience in NetForum Pro database, highly preferred.
- Preference given to candidates with knowledge of the grants management profession and/or field of philanthropy.
- Proficiency in Microsoft Office applications—with minimum intermediate capabilities in Excel and database applications (NetForum and Zoho experience preferred).
- Higher Logic knowledge preferred.
- Ability to work in a fast-paced environment.
- Ability to work collaboratively and independently on assigned responsibilities.
- Ability to handle multiple tasks, projects, and priorities effectively and professionally.
- Discretion and sound judgment on setting and adjusting priorities is required.

Compensation

A comprehensive salary and benefits package will be offered. The salary range for this position is \$45,500 – \$49,500 commensurate with experience.

Physical Demands

- Must be able to use the phone and computer, sometimes for prolonged periods.
- Must be able to travel nationally, on average 2-3 days per year.

Location and Work Environment

Our offices are located in downtown Washington, DC, near public transportation. Locals are encouraged to work at least one day a week in our office and may choose to work there all five days. This space is a shared office suite environment with moderate noise (e.g., colleagues' conversations, computers, and printers) and light traffic.

Work-from-home and non-standard (flex) working hours are also available for this position. Many staff are virtual, and you will be required to maintain core working hours from 10am – 3pm eastern to accommodate peers across all time zones. You will be required to use collaborative software and video conferencing to stay in touch with co-workers and colleagues.

Equal opportunity and having a diverse staff are fundamental principles of PEAK Grantmaking, where employment and promotional opportunities are based on individual capabilities and qualifications without regard to race, color, religion, gender, pregnancy, sexual orientation/affectational preference, age, national origin, marital status, citizenship, disability, veteran status, or any other protected category as established under law.

How to Apply

Please send resume and cover letter to dolores@peakgrantmaking.org.