



Career Opportunity

Senior Consultant for Philanthropy Services

ABOUT GOBEL GROUP

Gobel Group is the leading consulting firm working exclusively in healthcare philanthropy. No firm works with more hospitals, has more healthcare philanthropy consultants, has as much collective experience, provides as much innovative solutions or delivers as much return on investment. We believe healthcare philanthropy is different than other non-profit fundraising sectors. It is why healthcare is all we do.

Gobel offer clients the most comprehensive solution for building a robust healthcare philanthropy program -- from data analytics and data science; to program, campaign and organizational reviews and assessments; to grateful patient and campaign planning and management; and to database, operations and philanthropy services. We also provide clients with primary and secondary research, along with peer analysis and benchmarking.

More information on the Gobel Group can be found on our website at www.gobelgroup.com.

ABOUT THE ROLE

Gobel Group is looking for a dynamic, proactive and experienced healthcare philanthropy database/operations professional to join our team as the Senior Consultant for Philanthropy Services. The Senior Consultant will serve as part of the engagement team to guide clients in implementing our programs and offerings. The Consultant will serve as a lead in engagements and partner with clients to develop solutions and build out operational processes. The candidate must be extremely detail oriented, process driven, and have a data-first mindset. The candidate must also have expertise with fundraising management systems as well as experience with training/teaching others and experience building and maintaining metric reporting.

Our ideal candidate has the ability to interpret user requirements and translate them into actionable results. He or she has a proven track record of solid development operations skills and thrives on problem solving. The ideal candidate is experienced and enjoys working with clients to define goals and objectives that translate into clear deliverables towards the team. He or she enjoys both collaboration with a team as well as a strong commitment to work independently to meet objectives. The candidate masters the ability to successfully balance client expectations against timelines, budgets and resources. We are looking for a great communicator that is also a strong teacher/trainer/mentor with analytical and synthetic expertise combined with excellent people skills.

RESPONSIBILITIES

The Senior Consultant must understand the role of technology and the use of large datasets in fundraising operations and the type of support and services needed to help all staff at the client's organization thrive. The Consultant will understand how the client is utilizing its fundraising management system and other products in its current capacity by completing discovery sessions and/or an in-depth assessment as the engagement specifics and making recommendations. The Consultant will facilitate various conversations, working sessions and project management skills to articulate and help implement solutions that align with the overall fundraising strategy that has been identified.

Client Interaction, through onsite visits, virtual visits and phone sessions:

- Partner with clients to guide them through a structured process to accomplish necessary work, steps, deliverables and milestones in the scope of work.
- Assist clients to layout the necessary framework and foundation to be ready to roll-out various programs or products, such as machine-learning models, capacity analysis results, and grateful patient programs.
- Lead results-oriented discussions with clients to maximize results and ROI.
- Make recommended changes and modifications to client's lead/prospect generation workflow, database structure and operational processes.
- Educate, train and serve as a mentor to client's staff on learning and supporting robust programs and managing large datasets.
- Assist clients in strengthening the partnership between operations staff and frontline fundraisers.
- Provide fundraising management system training to staff members at the client's organization, both onsite in a group setting and offsite one-on-one over the phone.
- Provide expertise and training to staff members to understand and get comfortable with artificial intelligence technologies, machine-learning technologies, and using the scores/dataset in fundraising strategies and programs.
- Provide ongoing training and help desk support to clients.
- Deploy both project management and prospect management tools and techniques to provide exceptional customer service and assist clients with achieving optimal results.

Lists, Dashboards and Reports:

- Deploy mass-data lists to client and help client interpret, filter, sort and distribute to different pipelines.
- Develop, deploy and support reporting for identified KPIs (Key Performance Indicators) and other metrics for analysis.
- Manage and distribute dashboards to internal staff on a monthly and ad-hoc basis
- Implement tracking reports, lists and portfolio reviews for clients to support program.
- Create customized reports, individualized dashboards, queries and exports.
- Setup tracking reports, lists and portfolio reviews to support program.

Offsite/Remote Work:

- Analyze client data and systems and make recommendations based on findings.

- Create assessment documents and reports.
- Assist in building out client's system where needed or provide guidance for build-out to client as warranted in scope of work.
- Create and update detailed policies and procedures documentation for the implementation of recommended solutions to clients as well as any other areas identified throughout the client engagement.
- Audit client's data and/or system to ensure consistency of entry standards and administration of coding and entry standards.
- Develop automated and reusable routines for extracting specific information from the client's fundraising system.
- Find ways to streamline client's use of large data sets.
- Work alongside client's IT department to create data pulls and as necessary with vendors to facilitate appropriate discussions to support the work.
- Update training documents/reference guides and prep to deliver training.
- As needed import and export data to and from client's database or process global updates.
- Perform clean-up and maintenance on client's data system as needed.
- As needed, facilitate the installation of system updates and patches with client's IT.

Project Management:

- Maintain clients project plan, timeline and deliverables updating and communicating progress to client and company's engagement team members.
- Prepare agendas and materials for onsite visits, virtual visits/sessions and phone sessions.
- Keep track of client deliverables to ensure efficiently and effectively completing.

Special projects and other duties as assigned

REQUIREMENTS

- Six or more years of experience working in a healthcare philanthropy programs.
- Ability to work well in a team environment as well as independently.
- Bachelor's Degree, preferably in Computer Science, Information Systems or related field.
- Comfortable being onsite with clients as well as working virtually through video conferencing and over the phone with clients via screen share.
- Analytical and adept at problem solving and possess a strong technical foundation in database structure, configuration, installation and practice.
- Extremely detailed oriented, highly responsive and superb project management skills.
- A proven track record of interacting with various people at different levels including Operations/Philanthropy Services' staff, frontline fundraisers and directors of development.
- Good listening skills and able to serve as a positive mentor/trainer on client engagements.
- Deep knowledge of healthcare fundraising and grateful patient programs.
- Direct experience at multiple healthcare institutions with grateful patient programs.
- Broad understanding of Database/Philanthropy Services theory and practice.



- In-depth understanding and comfort with managing fundraising systems, biographical records and prospect management.
- Familiar with management of gift records and prospect research.
- Knowledge and capability to develop, deploy and support reporting for clients.
- Ability and desire to stay updated on industry best practices.
- Willing to work with software vendors or third-party vendors on the client's behalf
- Blackbaud certification and a strong working knowledge of Microsoft Access.
- Have advanced Excel skills including Pivot Reports and the ability to import and export data to and from the database or process global updates.
- Advanced level of knowledge of Raiser's Edge© as well as the products which integrate with Raisers Edge©.
- It will be considered a plus if Consultant has experience working with other major platforms, such as Salesforce, Blackbaud CRM and/or Advance. Microsoft SQL, and/or familiarity with APIs is a plus.

ADDITIONAL INFORMATION

This position requires travel to be onsite with the clients at certain points throughout the engagement, most times by yourself and sometimes alongside other members of the Gobel Group. Travel for client engagements should not exceed 40 percent of the position's time. When not onsite with clients, the Senior Consultant will work from his/her home office. Additional travel will be required beyond client visits for quarterly philanthropy services meetings, quarterly team meetings, annual summits, and potentially for business development and/or conferences. The Senior Consultant will report to the Vice President for Philanthropy Services.

As with all employees of Gobel, the Consultant will work to identify, cultivate, help solicit as part of a team, and steward client relationships. You will have the opportunity to help some of the best organizations in the world solve some of their most difficult philanthropic challenges. Throughout your tenure you will gain broad exposure to a variety of different areas in healthcare philanthropy.

The salary range for this position is approximately \$75,000 - \$125,000 depending on experience. The Gobel Group offers attractive profit sharing opportunities, along with full benefit and retirement programs. If interested, please forward cover letter and resume to jenny@gobelgroup.com.