



**Working
Solutions**
Capital. Consulting. Community.

Position: Impact Data Officer
Reports to: Director of Compliance & Impact
Department: Fund Development and Compliance
Location: San Francisco, California
Position type: Full-time, Non-exempt
Start Date: October 1, 2019

Working Solutions (www.workingsolutions.org) is a certified, nonprofit Community Development Financial Institution (CDFI) that supports San Francisco Bay Area entrepreneurs – with a focus on lower-income individuals, women, and entrepreneurs of color – to start and grow thriving local businesses. Working Solutions is the *First to Believe* in start-up and early-stage businesses by providing diverse entrepreneurs with affordable capital, customized business consulting, and community connections to increase economic opportunity in the San Francisco Bay Area. We make loans from \$5,000 up to \$50,000 and provide up to five years of post-loan business consulting. Working Solutions has invested over \$22 million in loans and grants in local small businesses, and we have educated thousands of entrepreneurs, resulting in more than 4,000 local jobs. Working Solutions has a growing team of 14 full-time employees with headquarters in San Francisco and a satellite office in Oakland.

Position Overview

The Impact Data Officer works closely across all departments – programs, fund development, accounting, and executive management as well as with external consultants – to manage Salesforce as our primary CRM for fundraising, program execution, and organizational impact. The ideal candidate will be an experienced Salesforce Administrator with superb attention to detail and excellent analytical and critical thinking skills. S/he will have confidence managing multiple projects and deadlines and strong communication skills.

Key Duties

Salesforce Administration:

- Serve as primary Salesforce Administrator for organization;
- Create and systematize reporting templates, dashboards, charts, and other tools;
- Support and train staff on use of Salesforce including data entry protocols; manage minor customizations to make data entry more efficient and effective.

Data Integrity:

- Work with Director of Compliance and Impact on data quality assurance; manage and enhance current tracking and reporting systems across departments;
- Source data for proposals and reports; ensure data is accurate and compelling to reflect organization's efforts and outcomes;
- Support Programs, Fund Development, and Accounting with ongoing compliance of required data sets for all revenue sources;
- Provide data analysis to make data driven recommendations for program improvements to senior management;
- Data entry as needed.



Solution Integration:

- Working with external consulting team, lead implementation of Salesforce integration with other technology platforms;
- Working with external consulting team, expand fundraising module within Salesforce and manage data migration to Salesforce platform.

Qualifications

- Some college and four (4) years relevant experience, including at least two (2) years of experience with data management or monitoring and evaluation using Salesforce;
- Experience as Salesforce Administrator required; excited to continue your Salesforce learnings with online and in-person trainings to ensure organization is making best use of the system;
- A wizard with spreadsheets (especially Excel) and some experience with analytics;
- Exceptional attention to detail, well organized, and thorough;
- Excellent communication skills;
- Deadline focused, fast worker; able to manage multiple moving projects at one time;
- Self-starter who takes initiative; ability to work independently with limited supervision and also cooperatively with a small, but mighty team;
- Knowledge and interest in the Community Development Finance Institution (CDFI) industry, entrepreneurship, microfinance, social enterprise, program development and evaluation, and/or small business is a plus.

Salary Commensurate with Experience

Excellent Benefits: Including but not limited to medical, dental, vision, 401(k), commuter checks, and generous holidays. *This position is based in San Francisco.*

Application Deadline: September 27, 2019.

Please email résumé and cover letter with the subject line "Impact Data Officer" to jobs@workingsolutions.org.

No phone calls please.

Working Solutions is an Equal Opportunity Employer.