



Salesforce Analyst Finance Department

Overview:

Launched in 1983 as Public Interest Projects, a 501(c)(3) public charity, NEO Philanthropy is a New York based national leader in innovative philanthropic solutions. We lead large-scale collaborative grantmaking funds on a range of social justice issues, provide fiscal sponsorship and management to projects and campaigns, manage donor-led projects and develop organization and field-focused capacity building initiatives.

Position:

The Salesforce Analyst will join NEO's growing central operations and will play an integral role with the Finance and Operations departments. This role will provide support the Chief Financial Officer and the Director of Operations, as well as a diverse range of staff with different needs. The ideal candidate will have strong knowledge of Salesforce NPSP as a certified Salesforce administrator. The candidate should be flexible and capable of multi-tasking, and should have strong project management skills. This position will report to the CFO and will work closely with the Director of Operations. The Salesforce Analyst is a full-time, exempt position.

Location:

NEO Philanthropy has its headquarters in NYC and the Finance and Operations teams are located in that office. NEO HQ has a hybrid work remote structure based on job function. It is our expectation that this role will be able to be fully remote with in-person meetings required 6-8 times per year; however, staff will have the option to select a partially or fully in-office schedule if they are based in NYC. This role will be expected to be available during the working hours 10a-4p EST to provide support.

Vaccine Requirement:

All NEO Philanthropy staff are required to be vaccinated against COVID-19. Requests for medical and/or religious exemptions from the vaccination requirement will be considered on an individual basis, to the extent required by law.

Responsibilities:

- Serve as primary system administrator for the Salesforce.com environment including grantee and project portals (communities)
- Manage day-to-day Salesforce and app integrations and troubleshooting
- Ensure the integrity of data through cyclical health checks of the database
- Orient and train new staff users to the Salesforce system, and grow the Salesforce.com skill set across the organization
- Create and develop training materials and resources for internal Salesforce users in collaboration with teams
- Serve as Project Manager with Salesforce consultants to address system upgrades and expansion

- Handle all basic administrative functions including user account maintenance, reports and dashboards, workflows and other routine tasks
- Complete regular internal system audits and prepare for upgrades, includes needs analyses and QA testing
- Coordinate the evaluation, scope, and completion of new development requests
- Work with organizational leadership to establish suitable processes to support administrative, development, and change management activities
- Effectively act as the liaison between users, vendors, and development consultants
- Work independently with members of the user community (super-users) to define and document development requirements
- Perform any related responsibilities and/or projects as assigned.

Qualifications:

To perform this job successfully, the incumbent must be able to perform each essential duty satisfactorily. The qualifications listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Salesforce.com Admin (ADM201 and ADM211) certified required
- Three (3) to five (5) year's-experience as a Salesforce.com administrator
- Experience with Salesforce NPSP and Outbound Funds Module
- Experience with Salesforce.com apps including Apsona, Form Assembly, and SignNow
- Excellent project management skills and a positive attitude
- Demonstrated ability to meet deadlines, handle and prioritize simultaneous requests, and manage laterally and upwards
- Creative and analytical thinker with strong problem-solving skills
- Proven/documented experience of successfully driving projects to completion
- Previous experience in dynamic relationship management
- Responsive and proactive working style
- Strong verbal and written communication skills
- Excellent judgement
- Mission-driven and passionate about social justice and nonprofit work
- Demonstrate an ability to communicate effectively at all levels of the organization
- Ability to critically evaluate information gathered from multiple sources, reconcile conflicts, breakdown high-level information into details, abstract up from low-level information to a general understanding, and distinguish user requests from the underlying true needs
- Ability to assess the impact of new requirements on Salesforce.com and applications, systems and processes
- Proven ability to design and implement new processes and corresponding resources to facilitate user adoption
- Strong understanding of the platform, with the ability to build custom apps and objects, formula fields, workflows, custom views, and other content of intermediate complexity
- Strong understanding of Salesforce.com best practices and functionality
- Strong data management abilities
- Comfortable working in multiple software and technology platforms

Compensation:

Salary range \$90,000- \$100,000, depending on experience. NEO provides generous benefits, which include medical, dental, vision, life, long term disability, and pet insurance. We also administer an FSA, EAP, commuter benefits, 401k retirement plans, with an employer match after one year of service, and have generous paid time off.

Hiring Policy:

NEO Philanthropy is an equal opportunity employer. We consider applicants for all positions without regard to race, color, religion, creed, gender, national origin, age, disability, marital or veteran status, sexual orientation, gender identity or any other legally protected status. Only those whose applications are being considered will be contacted. No phone calls please.

NEO Philanthropy Careers:

NEO Philanthropy is committed to attracting, developing and retaining exceptional people, and to creating a work environment that is dynamic, rewarding and enables each of us to realize our potential. NEO Philanthropy's work environment is safe and open to all employees and partners, respecting the full spectrum of race, color, religious creed, sex, gender identity, sexual orientation, national origin, political affiliation, ancestry, age, disability, genetic information, veteran status, and all other classifications protected by law in the locality and/or state in which you are working.

How to Apply:

Interested applicants should send an application that includes a resume, cover letter, and pay requirements to: jobs@neophilanthropy.org. Please include "Salesforce Analyst - [name]" in the subject of your email.