



**Ownership
Works**

Associate, Salesforce & Development Operations

New York, New York

To Apply

Please visit the [Application Portal here](#). Candidates are encouraged to apply as soon as possible. Due to volume, only those candidates considered for an interview will be contacted.

About Ownership Works

Founded in 2021, Ownership Works (O.W.) is a fast-growing nonprofit organization with a mission to increase prosperity through shared ownership at work. O.W. helps companies and investors implement shared ownership programs that make every employee an owner and honor the collective effort behind a company's success. At scale, employee ownership can help millions of lower-income workers and people of color build savings and wealth, often for the first time, at businesses that are more dynamic, resilient, and successful.

O.W. has set an ambitious goal of creating at least \$20B of wealth for workers by 2030 and, over the long term, making broad-based employee ownership the new norm at work. To achieve these goals, O.W. has two areas of focus:

Movement building. Through partnerships, network-building, education, data, and storytelling, O.W. is building a movement to increase the adoption of shared ownership by private and public companies. Over 80 private equity firms, financial institutions, foundations, labor advocates, and pension funds have joined the O.W. consortium as Founding Partners and made unprecedented commitments to advance the shared ownership movement.

Hands-on Guidance. In collaboration with its Founding Partners, O.W. helps public and private companies implement broad-based employee ownership programs that improve corporate cultures, increase employee engagement and satisfaction, and create an alignment of interests between employees and employers, all of which can support better outcomes for companies and workers. Since O.W.'s founding, over 75 companies have implemented shared ownership programs, reaching over 100,000 workers.

For more about O.W.'s impact, visit <https://ownershipworks.org/our-impact/>.

About the Position:

Ownership Works is seeking a self-motivated and ambitious professional interested in a challenging role that will help them develop their career in Salesforce & Development Operations. The Associate will be responsible for supporting our fundraising operations, primarily through data entry and maintenance in Salesforce, as well as supporting organizational wide Salesforce projects and initiatives. This person works closely with all team members of Ownership Works to identify, develop, and deploy new processes and enhance existing processes to support the organization's needs. This role is part technical project manager, part administrator, and part analyst.

Key Responsibilities:

Fundraising Operations (50%):

- Enters and tracks O.W. fundraising data in Salesforce, including 1) all donor payment records (tracking and distributing timely invoices for pledges, tracking, and following up on payment completion, executing our donor acknowledgment process, etc.) and 2) all current and prospective donor details, including cultivation tasks, contacts, relationship details and key emails, and reporting obligations (narrative, financial, and other deliverables).
- Manages data synchronization, maintains accurate records, and manages profiles (when necessary) for all O.W. fundraising channels, including Salesforce, QGiv, Double the Donate, corporate matching gift portals, and SharePoint files.
- Supports the tracking of data in Salesforce for key funder impact metrics and tracks information for special fundraising projects as they arise (events, campaigns, etc.).
- Creates accurate donor distribution lists and works with Marketing team to ensure successful delivery of content.
- Supports Business Engagement, Marketing, and Operations teams with partner and client data entry and tracking needs as requested.

Salesforce Administration (organization-wide) (40%):

- Serves as primary technical project manager of O.W. Salesforce Nonprofit Success Pack instance.
- Handles all basic administrative functions including user maintenance, permission sets, licenses, sharing rules, modification of page layouts, generation of reports and dashboards, creation of new fields, and other routine tasks.
- Collaborates with various O.W. team members for improvements or changes to the system and implements these changes as appropriate (i.e., receives and processes user requests, proposes and builds out a solution, tests, refines, and pushes solution into production).
- Manages integrations and improvements and collaborates with an external vendor when appropriate.
- Trains and provides troubleshooting for all users and enhances the Salesforce skillset across the organization.
- Creates and documents company processes and workflows including a full integrations map and data dictionary of the system.
- Supports the team in discrete data migration and data cleaning projects.

- Identifies upcoming Salesforce platform launches and releases, assesses how they relate to O.W.'s implementation, and manages integration.
- Automates processes using Salesforce tools such as flow automation and has familiarity with migrating process builder and workflow rules into flows.

Strategy & Planning (10%):

- Participates in Advancement team planning to develop, execute, and evaluate long-term goals and strategies.
- Builds a culture of Salesforce utilization across the organization and monitors Salesforce data to continually improve practices and inform organizational decisions.

Key Skills & Qualities

- Salesforce administration experience (including Flows, page layouts, training, customizations, dashboards, record types, custom objects, validations, profiles, roles) with the ability to build custom apps and objects, formula fields, automation processes, custom views, and other content of intermediate complexity.
- Preferred: experience with NPSP and managing Salesforce integrations typical for a nonprofit (Mailchimp, Account Engagement), donation platforms (QGiv and Double the Donate), and other integrations (QuickBooks, Outlook, etc.)
- Preferred: Salesforce Certified Administrator.
- Superior organizational skills; an ability to maintain constant attention to detail (the cornerstone of this role); strong instinct to proactively document everything.
- Exceptional project management skills that enable the execution of complex, multi-stakeholder projects over short-, medium-, and long-term timelines.
- Capable of adjusting quickly to shifting priorities; interested in being a proactive, positive member of an evolving team.
- Passion for serving as an internal-facing resource for the entire organization to improve team members' Salesforce skills and usage, and brainstorm how Salesforce can solve problems.
- Highly responsive, accountable, and collaborative.
- Demonstrated commitment to social justice and the mission of Ownership Works; interest in working at a dynamic and growing start-up nonprofit organization.

Minimum Qualifications

- BA required.
- Passion for social justice and the mission of Ownership Works; interest in becoming a subject matter expert in employee ownership.
- 1-3 years of experience in a nonprofit fundraising setting.
- 1-3 years of experience with sophisticated database management, preferably within Salesforce and/or other donor databases.
- 1-3 years of experience in project management at a mission-driven organization.

Equal Opportunity Employer

Ownership Works is an Equal Opportunity Employer. Women, people of color, people with disabilities, LGBTQIA persons, and veterans are encouraged to apply.

Base Salary Compensation Range

The compensation available for the role considers a variety of factors including, but not limited to, work location, individual skill set, previous/applicable experience, and other business needs. The estimated salary for individuals who work in New York City is up to \$85,000 based on experience, plus bonus.

Benefits

Excellent health, vision, and dental care benefits for you and your family. Unlimited paid time off. 401(k) retirement plan with generous employer contributions.

Location

Ownership Works is building a New York City-based team. We will have an office-centric hybrid work model that prioritizes the health and safety of our staff and partners. The role will include some travel.