



Strategic Philanthropy and Marketing Associate

Community Financial Resources (CFR) is looking for a Strategic Philanthropy & Marketing Associate who wants to roll up their sleeves and advance their skills within an innovative, national economic justice organization. As CFR grows, we need a passionate Associate who can be part of a dedicated team shaping the future of our organization. This position is for someone who is looking for an opportunity to build the financial power of low-income, low-wealth communities and be part of a diverse team that is passionate about social good.

Reporting to CFR's Executive Director, and supporting CFR's Development Consultant, the Associate will have primary responsibility for grant administration and reporting duties, while overseeing important details necessary to well-functioning fundraising efforts. The position also acts as CFR's administrative and MARCOM extraordinaire. This position is suited for someone who enjoys being a Jill or Jack of all trades while applying analytical thinking and strong project management.

Community Financial Resources (CFR) provides a pathway to financial well-being through products, tools and services that improve financial stability, protect assets, and establish a foundation to build wealth for low-income, low-wealth households, with a focus on communities of color.

CFR has empowered over 100,000 people nationwide to open up one or more new banking accounts (checking, savings, prepaid card, secured credit-builder card) or use CFR-sponsored financial tools. Our groundbreaking behavior-based financial education program motivates participants to apply newly learned skills using CFR's real-world financial products. CFR's recently launched MoneyGoals app helps people reach their financial goals through day-to-day coaching.

Primary Responsibilities

Philanthropy 50%

- Support the management of a portfolio of funders and prospects, including contributing to strategy development and tracking status and next steps.
- Manage, report on, and ensure timely follow up on funder-related tasks, deliverables, and timelines.
- Conduct the full range of activities required to prepare, submit, and manage grant proposals and reports.
- Support writing grant proposals and reports, including collaborating with the Partner Programs team to gather and integrate new research, data, and stories to match funders' needs and interests.
- Coordinate with Partner Programs team to manage impact data and report on key metrics to funders, including conducting additional data analytics as needed.
- In coordination with the Finance Officer, track budget reports.
- Track and report on funds and fundraising goals, including serving as primary liaison with ED on fundraising pipeline.
- Maintain donor and grant databases and files, including maintaining contacts and tracking donations, due dates, and grant pipelines.
- Conduct prospect research to diversify and grow the pipeline of funders.
- Prepare ED for funder meetings, helping to maintain CFR's relationships with current donors and foster relations with prospective donors.
- Facilitate bi-weekly grants check-in meetings with the Development team.

- Perform regular relationship management data entry.
- Assist with other fundraising projects as requested.

MARCOM 25%

- Facilitate monthly MARCOM check-in meetings with the ED.
- In coordination with the ED, lead and implement CFR's Annual Appeal process.
- Manage CFR's Website, Blog and Social Media.
- With the support of the ED, initiate and draft CFR's MARCOM content such as blog posts, newsletters, or other communications campaigns.
- Manage CFR's list serves and implement mass mailing campaigns.
- Liaise with external partners or journalists regarding CFR's communications efforts.

Administrative Management 25%

- Function as the primary administrator of CFR's Domains, Email, CRM database, and other software
- Track CFR's subscription services
- Provide IT support to CFR staff
- Manage the organization of CFR's shared drive and other cloud-based services
- Manage Organization calendar and assist in scheduling meetings
- Other duties as needed to administer CFR's day-to-day operations.

Key Knowledge, Skills & Abilities

- 2+ years' experience of grant writing and/or writing for external audiences, research, project management or comparable experience required
- Superior written and interpersonal communication skills; ability to write and communicate clear, structured, articulate, and persuasive narratives.
- Strong editing skills, excellent attention to detail, and ability to use data to create strategic and compelling arguments.
- Knowledge of a variety of fundraising strategies and methods.
- Able to conduct research, gather data, analyze information, and prepare reports and other materials.
- Team player who thrives on collaboration.
- Ability to work independently and successfully manage multiple projects with competing deadlines.
- Responsible, flexible, hard-working, and ethical, with a strong sense of commitment.
- Possess a high level of organizational skills, excellent attention to detail, and able to prioritize in a deadline-driven environment.
- Skilled with Google Suite; proficient in Microsoft Word, PowerPoint, and Excel.
- Experience with eTapestry (or other CRMs) and project management tools preferred.
- Knowledge of consumer financial services, financial counseling and education, and/or community/economic development a plus
- Possess an interest in a non-profit career, particularly development and MARCOM; enthusiasm for CFR's mission

Salary & Benefits

- Full benefits package with coverage towards medical, dental and vision plans (Kaiser)
- Generous PTO, holidays (12 days), holiday break (between Christmas Day and New Year's Day), sick leave (5 days), summer Fridays early closure (between Memorial Day and Labor Day), and pre-holiday early closure
- Support for professional development opportunities
- **Compensation:** This role is a full-time position and ranges between \$50,000 - \$65,000 (DOE) in yearly salary paid monthly.

Location

Community Financial Resources maintains a virtual office environment with team members working remotely. Under healthy and safe conditions, the team meets one to two times a year in-person.

Equal Employment Opportunity

Because Community Financial Resources (CFR) values a diverse and representative workplace, people who identify as Black, Indigenous, and People of Color, and people of all gender identities are strongly encouraged to apply. CFR 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. Our 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.

Your Next Step

If this opportunity sounds like it's for you, please submit a PDF of your resume and answers to the following questions to jobs@communityfinancialresources.org with the position in the subject line. Applications without responses to the questions will not be considered. A cover letter is not necessary.

1. Why are you interested in working with Community Financial Resources? (150 words)
2. What role do financial products play in people's lives? (200 words)
3. Tell us about a time when you had to manage multiple stakeholders and/or projects with competing priorities. How did you make the decisions on what to prioritize? (200 words)

To learn more about Community Financial Resources, please visit www.communityfinancialresources.org