



Job Title: Data and Financial Specialist

Department: Administration

Reports To: Office Manager

Effective Date: July 1, 2022

Organization Profile:

PODER empowers individuals with the necessary academic tools to promote human dignity, increase employment potential, and facilitate participation in the larger community.

Since 1997, PODER's objective has been to empower Spanish-speaking adult immigrants to create successful and fulfilling new lives in the United States. Through a deep commitment to the needs of the immigrant communities on Chicago's southwest side, PODER provides critical societal and workforce integration services with both immediate and long-term impact for families, communities, and employers throughout the City of Chicago.

Job Summary:

PODER's data and financial specialist will be a self-starter as well as an effective team player, motivated by the opportunity to contribute to the growth of the organization. This position provides support to the office manager and management team through a variety of tasks related to data management and financial reporting, ensuring efficiency and accuracy. The data and financial specialist will have a high level of computer proficiency and will be familiar with not-for-profit organizational settings.

The data and financial specialist is a full-time salaried position and reports to PODER's Office Manager.

Duties & responsibilities include, but are not limited to:

- Process regular Accounts Payable and Accounts Receivable
- Issue invoices and vouchers to customers and funders
- Ensure that receivables are collected promptly
- Track expenditures and revenues by function, activity, and grant
- Support the office manager during audits, financial reporting periods, etc.
- Ensure federal, state, city, and private grant compliance
- Provide clerical and administrative support to management as requested
- Utilize reporting tools from Salesforce and DAIS-I to produce reports for internal and external stakeholders
- Daily management of Salesforce's CRM and DAIS-I database, including ensuring that data is updated, accurate, unduplicated, and organized
- Support team members in the effective and efficient utilization of the CRM to achieve data-driven results, including serving as the point person for resolving technical CRM database issues
- Conduct query maintenance to ensure up-to-date reporting
- Identify, diagnose, and correct database issues
- Maintain regular updates to dashboards

Required Skills & Abilities:

- Excellent organizational skills and acute attention to detail
- Excellent time management skills with a proven ability to meet deadlines
- Ability to prioritize tasks
- Ability to act with integrity, professionalism, and confidentiality
- Managing processes
- Proficient in accounting and financial software (QuickBooks preferred)



- Data analysis (Salesforce and DAIS-I preferred)
- Proficient in Microsoft Office Suite
- Bilingual Spanish/English preferred

Education and Experience:

- Prior experience in a not-for-profit setting preferred
- Have an understanding of financial reporting and general ledger structure.
- Must have at least one year experience in accounting
- Bachelor's degree in accounting/finance focus preferred
- High level of computer literacy, and familiarity with project management tools (Basecamp) and CRM platforms (Salesforce highly preferred)

Physical Requirements:

- The data and financial specialist position is clerical and primarily a sedentary role and may require sitting or standing for extended periods of time.

Equal Employment Opportunity Statement

It is the policy of PODER to provide equal employment opportunity (EEO) to all persons regardless of age, color, national origin, citizenship status, physical or mental disability, race, religion, creed, gender, sex, sexual orientation, gender identity and/or expression, genetic information, marital status, status with regard to public assistance, veteran status, or any other characteristic protected by federal, state or local law. In addition, PODER will provide reasonable accommodations for qualified individuals with disabilities.