



Beneficial State Foundation

Open Position: Finance and Organizational Development Manager

Details:

- **Classification:** Regular, Full Time, Exempt
- **Location:** This position is Washington, Oregon or California based. This position is not open to candidates based in other states. For Washington and Oregon based candidates, this role will be permanently remote. For California based candidates, there may be the option to work out of our Oakland, CA or Fresno, CA office when our return to office plan is implemented. Due to the COVID-19 pandemic, Beneficial State Foundation staff are currently required to work from home full time through at least July 1, 2021. This requirement may be extended based on our COVID-19 emergency response planning.
- **Reports to:** Annie Claybaugh, VP of Finance of Operations
- **Manages:** No direct reports

Compensation

We use geographic zones when determining starting salary. To give candidates a sense of the range, the starting salary for this role is \$77,600 - \$87,550.

Benefits

Beneficial State Foundation offers:

- Medical, Dental, & Vision
- 401(k) (eligibility after 3 months) with 6% employer matching contribution
- Generous vacation time (17 days), sick time (12 days) and paid holiday schedule (17 office closure days including a full week office closure at the end of the calendar year)
- 32 hours a year of paid time off for volunteering, activism and mutual aid
- Remote work/green commute stipend (\$100 gross per month) and wellness activity stipend (\$65 gross per month)
- Education reimbursement up to \$1,500 annually for degree programs. Up to \$500 of this total can be used for qualifying continuing education (seminars, conferences, etc.)

Work Environment

Due to the pandemic, all staff are currently working from home. We provide staff with support for remote work, including a monthly stipend, expense reimbursement, ergonomic assessment resources, etc.

How to Apply:

Applications are due by 9am PST on April 26th, 2021.

Please submit a resume and answer our application questions through our [job application form](#). More information can be found here: <https://beneficialstate.org/our-team/>



A cover letter is not required. Applications without responses to the required application questions will not be considered.

If there is anything we can do to accommodate you to participate fully in the application or interview process, please let us know.

Beneficial State Foundation provides equal employment opportunities to all employees and applicants in all company facilities without regard to race, color, religious creed, sex, national origin, ancestry, citizenship status, pregnancy, childbirth, physical disability, mental and/or intellectual disability, age, military status or status as a Vietnam-era or special disabled veteran, marital status, registered domestic partner or civil union status, gender (including sex stereotyping and gender identity or expression), medical condition (including, but not limited to, cancer related or HIV/AIDS related), genetic information, or sexual orientation in accordance with applicable federal, state and local laws.

Hiring process

We appreciate your interest in our work and our team!

Hiring takes a lot of coordination, and our timing and process are subject to change.

Our target start date for this position is approximately June 16th, 2021.

Here is a brief overview of some of our hiring practices to help you in what to expect when applying:

- Connection and transparency are core values of ours. We know that connecting with current staff can be an important step in information gathering for our prospective team members. However, we also recognize folks have differing access to social and professional networks in their search for work, which can reinforce systems of bias and oppression. We ask our staff not to accept requests for informational interviews or informal chats in connection with active job postings.

Our hiring process typically consists of:

- Phone interview with a member of the hiring committee for the position (45 minutes)
- Panel interview with the full hiring committee, typically 3-4 folks (1 hour, currently conducted by Zoom).
- Final interview with panel style interview and a skill assessment presentation, with some materials prepared by candidate in advance (90 minutes total, approximately 30 minutes for brief presentation inclusive of Q&A and then 60-minute panel interview, currently done over Zoom). We invite our entire staff to final candidate presentations (an average of about 10 folks typically attend) and then there is a final panel interview with the hiring committee and other key collaborators.





About Beneficial State Foundation and Our Mission

Beneficial State Foundation is a 501(c)(3) nonprofit whose mission is to change the banking system for good. For decades banks have damaged our communities and our planet, accelerating both economic inequality and environmental disaster. This harmful way of banking must stop and our strategy to both demonstrate and reshape banking practices and behaviors reflects the multi-pronged approach we take to systems change. In partnership with our communities and our allies, Beneficial State Foundation works to transform the banking industry in two ways: as a banking system change agent and advocate, and as a bank owner, investor, and practitioner.

As a systems change agent, we engage in policy and regulatory advocacy, banking industry relations, and field building to support, convene, and build capacity with equitable banking partners. As a bank owner, investor, and practitioner, we develop and test equitable banking standards and metrics. We measure the social and environmental impact of Beneficial State Bank. We also house California's [Clean Vehicle Assistance Program](#).

We are a small but effective team grounded in social justice and strong core values. You can read more about Beneficial State Foundation's core values [here](#) and at <https://beneficialstate.org/our-team/>

We have staff located in Washington, Oregon and California. We currently have offices in Oakland (headquarters) and Fresno, California.

About the Clean Vehicle Assistance Program

The [Clean Vehicle Assistance Program](#) (CVA Program) is California's leading state-wide, equity-focused clean vehicle incentive program. The program was launched in June 2018 with the mission to make clean vehicles more accessible and affordable to Californians with lower household incomes by providing grants and fair financing options. The quickly growing pilot program is administered by Beneficial State Foundation and funded by the California Air Resources Board.

Position Overview

We are excited to expand our 3-person administration team ("admin team") as we lead the finance, operations and human resources functions for Beneficial State Foundation. Our admin team is currently our VP of Organizational Development and Culture, our VP of Finance and Operations, and our Operations and Graphic Design Manager.

Beneficial State Foundation has more than tripled in size to 35 staff in the past two years. With this growth comes more operational, financial and human resources complexity. This is a brand-new role for our organization, and it's designed to support both our accounting and human resource functions.



We are looking for someone with at least 6 years of professional experience, preferably 4 or more of which has been with direct responsibilities within organizational accounting/finance and human resources. Our ideal candidate has experience with both accounting/finance and human resources, however candidates with more experience in one function than the other are encouraged to apply and can describe relevant experience in the application questions.

This role provides critical support to all staff and managers as we continue to evolve how we work together and achieve our mission while centering racial justice and employee wellbeing. This position is focused on administrative responsibilities with the opportunity for growth and empowered leadership of organizational processes and employee experience programs.

Essential Job Duties and Responsibilities

Finance and Accounting – 50%

Working with our VP, Finance and Operations and external accounting consultants, this role will help to manage the following:

- Create monthly bank statement transaction reports in coordination with external accountants.
- Track and submit departmental budgets on a monthly basis.
- Track multiple individual budgets and generate reports.
- Maintain an organized digital accounting folder and finance records
- Assist in managing the accounts payable process.
- Manage our expense and reimbursement policy and processes.
- Assist with many tax and regulatory reports and filings.
- Assist with the annual audit and help manage relationship with the auditing firm.
- Submit 401(k) contributions and serve as co-administrator for the Fidelity retirement plan account.
- Research, recommend, and manage best practices and policies in non-profit finance management.

Human Resources Administration – 30%

Working with our VP of Organizational Development and Culture, and Insperity, our Professional Employer Organization (PEO), this role will manage HR administrative processes for our staff of 35+, including:

- Manage payroll operations in coordination with our PEO, including checking and auditing timekeeping records, and managing payroll submission.
- Manage employee records both within our PEO's HRIS and our personnel files.
- Maintain job descriptions for all staff.
- Support internal communications including maintenance of HR materials on network drives and intranet site for staff.



- Project manage hiring process including creating job postings, coordinating interviews and supporting our equity driven hiring committee model.
- Support new employee onboarding.
- Coordinate the resolution of employee policy-related procedural problems and questions.
- Serve as primary administrator for Insperity Premier (HRIS) and TimeStar (timekeeping) software and assist staff with learning and navigating these platforms.
- Support performance management, including project management of performance review process and supporting managers with performance counseling.
- Support HR compliance (with PEO) including ongoing COVID-19 emergency response, Affordable Care Act, harassment prevention training, etc.
- Recommend and manage initiatives in support of employee experience and organizational development aligned to our anti-racism and Diversity, Equity, Inclusion and Belonging work.

Admin Team (Finance, Operations, Human Resources) Support and Organization-wide Responsibilities (20 %)

- Create and fine-tune organizational processes, and workflows that reflect our culture and values.
- Support admin department goals, objectives, and projects as needed.
- Support and participate in organization-wide anti-racism and DEI work and other activities that support staff belonging and wellbeing.
- Maintain an organized digital and paper (if applicable) records and filing system.

Job Qualifications

We are passionate about developing a diverse and inclusive workforce. If you are excited about this role but do not meet every qualification listed below, we urge you to apply. Transferable skills are any skills gained through education, work experience (including the military), or life experience that are relevant for this position. Be sure to describe any transferable skills in your application and clearly explain how they apply to this position.

- Bachelor's degree or equivalent combination of education and transferable experience.
- 6+ years of work experience, with 4+ years of work experience in three or more of these areas required: (payroll administration, HR generalist responsibilities, compensation and benefits, hiring and onboarding, expense management, accounts payable, tax and compliance, accounting, budget management).
- Intermediate proficiency with Microsoft Excel required.
- Experience working in accounting software required (QuickBooks preferred).
- Knowledge of and experience working with Generally Accepted Accounting Principles.
- Solid experience in coordinating audit activities and managing reporting, budget development and analysis, accounts payable and receivable, and general ledger.
- Nonprofit experience, with experience with fund/grants accounting.
- Working knowledge of principles, practices and dynamics of human resource management and employee engagement.



- Working knowledge of employment-related laws and regulations.
- Technology knowledge and experience working with various platforms and tools including Microsoft Suite / Microsoft 365, Google Suite, Slack and Zoom.
- Good judgment to manage sensitive and confidential matters.
- Commitment to social, economic, environmental and racial justice and background working in these areas.
- Demonstrates interest in contributing to and working by Beneficial State Foundation's Core Values.
- Strong project manager with the ability to organize and prioritize multiple work streams (familiarity with Basecamp is a plus).
- Comfort and flexibility in working remotely and supporting and collaborating with remote staff.
- Must be able to work autonomously and proactively with high-level direction when needed and also able to work collaboratively with a variety of stakeholders.

