



POSITION DESCRIPTION

Position Title: Salesforce Reporting Analyst
Candidate: TBD
Department: Admin
Supervisor: Chief Financial Officer, CFO / Director of IT
FLSA: Full-Time/Exempt
Salary Range: \$90,000
Effective Date: ASAP

OUR IMPACT

For over 50 years, Samaritan House has been leading the fight against poverty in San Mateo County. We're the only organization that delivers the full breadth of essential services and personalized support to the working poor. By ensuring our clients are fed, clothed, healthy, and housed, we help them create their own stability and remain an active, successful part of our community. After all, an enduring community is only possible when every person has the resources they need to live.

OUR CULTURE

We're passionate about providing our employees with a supportive work environment and experiences that help them grow. We offer excellent opportunities for individuals with proven strong, creative, results-driven leadership skills and stellar work ethics. We welcome candidates who love working with people of diverse backgrounds and want to make a difference by fostering community care for our neighbors in need.

YOUR IMPACT

Under the general supervision of the Chief Financial Officer, the Salesforce Reporting Analyst is responsible for providing accurate and timely delivery of reporting requests and related services that result in case management, shelter services, client retention, growth, client satisfaction, and program outcomes. This position is responsible for researching, compiling, and analyzing information; preparing reports; assessing services and performing quality control; consulting with management and other staff; performing special projects; Assist or is responsible for the creation of technical design. Tests applications; analyzing operational processes and recommending improvements; developing performance measures; developing and updating business plans and assisting with strategic planning. Reviews progress with management.

JOB QUALIFICATIONS

Please note our preferred and in some cases required qualifications for this position:

EDUCATION:

- Bachelor's degree in data analysis, computer science or related field.
- Salesforce Certified Administrator preferred.

EXPERIENCE:

- Minimum 2 years of hands-on experience with design and development of Salesforce reporting solutions or business analysis experience is required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Strong understanding of the Salesforce data model, types of lookup field relationships, and implications of different relationship types.
- Strong understanding of Salesforce formulas, as used in fields as well as reports (row-level and aggregate).
- Strong understanding of Salesforce report types and report templates (summary, tabular, matrix, and joined).

- Ability to create Salesforce reports with complex filter logic.
- Strong understanding of Salesforce dashboards, including:
 - Types of dashboard visualizations.
 - Dashboard filters.
 - Drafting aggregate reports to feed dashboard visualizations.
- Able to understand and write SOQL queries that:
 - Select and filter records across multiple related objects (cross-object queries).
 - Filter records using subqueries.
 - Aggregate records via grouping functions.
- Familiarity with Microsoft Excel, including:
 - Building complex reporting logic using Excel formulas.
 - Common formulas and approaches to linking or referencing data (i.e., INDEX and MATCH, VLOOKUP, XLOOKUP).
 - Array formulas.
- Able to work with stakeholders to understand, develop, and document complex reporting requirements.
- Able to clearly communicate the benefits and drawbacks of various approaches to designing reporting solutions.
- Strong documentation and communication skills.
- Experience with Exponent Case Management (ECM) and/or familiarity with the ECM data model
- Experience with XL Connector for Salesforce
- Experience with Declarative Lookup Rollup Summary (DLRS) tool
- Experience with non-profit organizations, preferably in the Human Services space
- Prior experience with building data visualizations on BI platforms like Tableau, Power BI, Pentaho, etc.
- Understanding of Salesforce report and query optimization strategies.
- Must possess a solutions-based approach to problem solving. Ability to be creative and show initiative and act as an independent employee while having a team player approach and attitude.
- Excellent interpersonal skills. Ability to establish and maintain successful and effective relationships with Samaritan House constituents (internal and external) and partnering agencies.

PHYSICAL REQUIREMENTS AND BACKGROUND CHECK

Candidate must have the physical, visual, and auditory ability to perform the essential functions of the job and to respond to emergencies with or without reasonable accommodations. Reference checks and background checks will be performed prior to and at commencement of employment. Candidate must be able to work in a clinic environment with occasional-to-regular interruptions. Activities may include but are not limited to: repetitive hand/arm motion (computer work), extended periods of standing and/or sitting at a computer workstation, regular travel, occasional bending, pulling, pushing, reaching, lifting, and carrying up to 20 pounds. This position will require the usage of a mobile device or other assigned equipment, which will be provided. Position is on site with occasional travel to partner agencies as assigned.

ESSENTIAL FUNCTIONS OF THE JOB

1. Collaborate with stakeholders to understand their needs, gather requirements, and document them in detail. Ensure that all requirements are aligned with business objectives and are feasible within the Salesforce platform.
2. Analyze current programs processes, identify areas for reporting improvement, and recommend Salesforce solutions to enhance reporting efficiency and effectiveness.
3. Work closely with finance, data, admin, and other departments to design reporting solutions that meet organizational requirements. Provide input on customizations and workflows to meet reporting objectives.
4. Create clear and concise user stories, process flows, and technical documentation to support development and implementation. Ensure that all documentation is up-to-date and accessible to relevant teams.
5. Serve as a liaison between data team, end-users and technical teams, ensuring that communication is clear and that all parties are aligned throughout the project lifecycle.
6. Participate in the testing process by creating test cases, executing tests, and validating that the solutions meet organizational requirements. Assist with user acceptance testing (UAT) and ensure that any issues are resolved before deployment.
7. Provide training and support to end-users, helping them understand and effectively use the Salesforce platform. Stay informed about Salesforce updates, new features, and best practices. Recommend and implement improvements to Salesforce processes and usage.

8. Assist with data migration, data quality management, and reporting to ensure that data within Salesforce is accurate, consistent, and supports organizational decision-making.
9. Other duties as assigned.

HOW TO APPLY

Interested candidates for this position will be required to submit a cover letter and resume to:

SAMARITAN HOUSE HR Specialist/Recruiter

4031 Pacific Blvd. San Mateo, CA 94403

E-mail: jobs@samaritanhousesanmateo.org Via facsimile: (650) 294-4336

No phone calls, please! Samaritan House is an equal opportunity employer. Because of the volume of applications Samaritan House receives, we regret we are not able to respond to every applicant individually. If your skills and experience are a good match for this position, we will contact you for an interview.

ACKNOWLEDGMENT

Please sign below in acknowledgment that you have received and understand the job description of Salesforce Reporting Analyst

Employee Signature

Date

Supervisor Signature

Date

Vice President of Human Resources

Date