Financial Catalyst Associate

Qualifications for employment with Watermark CDC include having made a life commitment to Jesus Christ, agreement in writing with the Beliefs and Governance statements of Watermark Community Church and having a work history and a lifestyle that are consistent with biblical principles. Must be an existing member of Watermark Community Church or willing to become one.

JOB TITLE: Financial Catalyst Associate

FLSA STATUS: Exempt

ORGANIZATION: Watermark CDC

REPORTS TO: Financial Catalyst Coordinator

POSITION SUMMARY: Watermark CDC's vision is to "Transform Economic Welfare." The Financial Catalyst Associate will assist the Financial Catalyst Coordinator with execution of Financial Catalyst by managing administrative systems, program execution, and building strong relationships with volunteers, participants, and partner organizations. This role helps create an excellent participant and volunteer experience through organization, hospitality, communication, attention to detail, and consistent follow-through.

SPIRITUAL GIFTS:

- Administration
- Hospitality
- Discernment
- Service
- Leadership
- Wisdom

ESSENTIAL SKILLS & EXPERIENCE:

- Bachelor's Degree preferred (Business, Management, Accounting, Finance, or related/equivalent field).
- One to three years of administrative, operations, and/or customer service experience, especially in nonprofit, financial, or legal industries is preferred.
- Deep love for Jesus and desire to support Kingdom work through financial empowerment.
- Previous experience in support of LMI - Low-to-Moderate Income - groups is preferred.
- Strong organizational and administrative skills.
- Ability to manage details, problem solve and follow through on responsibilities.
- Strong written and verbal communication skills.
- Ability to build relationships with people from diverse backgrounds.
- Comfortable working in an entrepreneurial environment.
- Ability to manage multiple priorities.
- Experience with Microsoft Office, Salesforce, and Asana preferred.

POSITION RESPONSIBILITES:

- **Program & Event Support – 35%**
  - Own execution of weekly and monthly Financial Catalyst class, from planning to follow-up, with a high level of dignity, development, & discipleship alongside a team of volunteers
  - Attend weeknight classes, in North and South Dallas, and serve as the primary point of contact for event logistics, volunteers and participants.
  - Support relationships with asset vendors, subject matter experts, and referring programs through clear and timely communication and scheduling.
- **Administrative Operations & Financial Processes – 30%**
  - Oversee asset purchase process, including preparing participants for their purchases; following up on prerequisites; performing initial evaluation of requests; communicating between stakeholders; and completing financial transactions with a high degree of accuracy, transparency, and attention to detail.
  - Manage initiative email inbox, exercising discernment in communication, delegation, and escalation to appropriate channels and following Watermark CDC communication standards.
- **Participant and Volunteer Experience – 20%**
  - Care for and empower all Financial Catalyst volunteers from initial interest and interview to ongoing discipleship and encouragement.

    - Prioritize participant's experience and ensure connection, care, discipleship, impact, and storytelling.
- **Systems & Data Management – 10%**
    - Track metrics for established key indicators of success to be accountable for operational excellence.
    - Ensure timeliness and accuracy of data and reporting using Salesforce, Formstack, Excel, and PowerPoint.
- **Additional Project Support – 5%**
    - Provide support for ad hoc Watermark CDC events and other cross-functional projects as needs arise.

MARKERS OF AN IDEAL CANDIDATE:

- Has a deep love for Jesus and the local church.
- Embodies and lives out the virtues of compassion, empowerment, courage, grit, and celebration.
- Passion for supporting Kingdom work through economic development in our city of Dallas.
- High capacity, gritty leader who is warm, hospitable, and joyful in demeanor.
- Flexible and adaptable in an entrepreneurial work environment.
- Humble, courageous, and open to direct feedback.
- Highly relational and able to interact with a wide variety of audiences.
- Excellent interpersonal communication skills.
- Highly organized and able to manage complexity.
- Takes initiative and follows through with excellence.
- Balances independent ownership with collaborative teamwork.
- High attention to detail while being autonomous and self-responsible, yet enjoying collaboration