

Criterion Institute

Position Description: Relationship Management Assistant

Goal start date: June 15, 2019

Location: Remote; *90 mile radius from Haddam, CT*

Organization Description:

Criterion Institute is the leading think tank focused on using finance as a tool for social change. We work with social change-makers to demystify finance and equip them with the knowledge and skills to engage with and shift financial systems. We also work with financial actors, supporting them with tools and resources to better incorporate data on social issues, with close attention to gender patterns, into the structures, processes and analysis of their investment strategies.

We are working towards a future where the power of our financial systems is widely used for social good. Our work is informed by our values of grace, hospitality and the power of invitation. Culturally, Criterion Institute is a collaborative, inquisitive and fast-paced place to work. Team members might spend one day connecting with leaders of capital markets in Asia, and the next day facilitating a meeting of community organizers in Milwaukee. We work across a breadth of sectors, industries and geographies all focused on finance as a tool for social change.

As has been the case for over fifteen years, the Criterion team works in a virtual office environment – from home offices or urban hubs. All Criterion staff members are provided with sufficient equipment to set up a home office and are expected to work collaboratively and independently.

Position Description:

We are seeking an ambitious and organized individual interested in Criterion's purpose to use finance as a tool for social change. As Criterion Institute scales as a nonprofit, we are at a critical point for the organization – one that requires maturity, multitasking, focusing on a diverse set of activities, eagerness to learn, and the ability to think broadly and act strategically.

The Relationship Management Assistant will partner with the President to ensure the organization's success by tracking and supporting our strategic partnerships and projects, supporting fundraising and development, and leveraging the President's time for greatest impact. While this position will be primarily remote, the candidate may be expected to travel to the home office in Haddam, CT on occasion (estimating 1-2 times per month), as well as participate in quarterly team meetings in Connecticut. This is a position with remarkable access to institutional leaders who are at the forefront of rethinking the economy.

Responsibilities

- Support managing of relationships for the organization; likely to include support for personal communications, tracking of funding and partnership opportunities, maintaining processes around relationship management.
- Prepare and edit correspondence and drafts on behalf of the President to facilitate relationship development strategies.
- Develop and implement day-to-day systems that leverage the work of the President.

- Provide pre- and post-planning for events and travel ensuring potential opportunities to further development partnerships are considered, logistics run smoothly, and details are worked out for maximum impact of each trip.
- Track and manage regular contact with partners to ensure projects that expand Criterion's mission are in progress and show any changes in background accordingly. Meticulously manage each relationship's details in Salesforce.
- Work with Director of Engagement to maintain tracking systems, including dashboards and performance metrics.
- Organize meetings and coordinate calendaring across multiple time zones nationally and internationally.
- Maintain CRM system records and support team adaption; schedule updates and trainings to ensure the system is running efficiently and effectively.

Requirements:

- 2-4 years' experience working in a position with similar responsibilities
- Strong organizational skills, attention to detail, and task management
- Strong technical skills including proficiency of Salesforce, Google Apps, Wordpress, and Microsoft Office 365 as a user. Systems administrator experience a plus
- Experience working remotely and across multiple time zones
- Interest in impact investing space and financial systems, and creating an economy that works for everyone
- Thoughtful and deliberate commitment to social change; comfort with and attraction towards innovative approaches and systems change
- Comfort with engaging with and understanding the complexity of Criterion's various audiences and making connections between donors, partners, and projects
- Intellectual depth – including ability to process and communicate complex ideas
- Clear ambition and eagerness to perform at a high level – willing to take on challenges and navigate through ambiguity to get to insights

Salary:

The salary range for this position is estimated at \$42,000 - \$50,000 depending on experience and location of residence.

Benefits:

Benefits include opportunity to work remotely with flexibility; health coverage; and paid time off (4 weeks) and holidays (10 days).

How to Apply:

Send resume and cover letter expressing your interest in our mission to info@critterioninstitute.org. Inquiries without a cover letter that demonstrates a knowledge of our mission and a clear statement of how our mission aligns with your goals will not be considered.

Not the right fit? If you are interested in Criterion, however don't feel this position is the right fit, we encourage you to reach out and let us know what you are interested in about our organization as well as

what you could offer to help us reach our goals. Send an email with this information to info@criterioninstitute.org

Criterion Institute is committed to diversity and to equal opportunity employment. Criterion Institute does not discriminate on the basis of race, creed, color, ethnicity, national origin, religion, sex, sexual orientation, gender identity and expression, age, height, weight, physical or mental ability (including HIV status), veteran status, military obligations, or marital status.

Updated: 04/10/2019