



Salesforce Operations & Data Optimization Consultant (Contract) Position Description

The Center for Civic Education (Center) is a national nonprofit and the nation's leading provider of civic and constitutional education. For over 60 years, the Center has advanced the civic knowledge, skills, and dispositions students and educators need to participate thoughtfully in democratic life. Through renowned nationally recognized programs We the People: The Citizen and the Constitution and Project Citizen: Community Engagement in Public Policy, the Center supports educators and students nationwide through rigorous, research-backed instructional models that integrate constitutional inquiry, civil discourse, disciplinary literacy, and authentic democratic practice. At a pivotal moment for civic learning in the United States, the Center is expanding its national impact and seeking talented professionals who want to help shape the future of civic education.

Engagement Details

- Contract Position
- Remote
- 3-6 Month Engagement
- Up to \$25,000 Fixed Fee

Reports To: **Vice President & Chief Operating Financial Officer**

Key Partners

- Vice President & Chief Program Officer
- Director of Advancement
- Senior Accountant
- Program Directors and Managers
- Marketing & Communications Team
- External Technology Vendors and Consultants

About the Engagement

The Center for Civic Education is seeking an experienced Salesforce consultant to help stabilize, optimize, and document our Salesforce environment.

We are looking for a hands-on consultant who can assess our current Salesforce ecosystem, improve data quality, address integration challenges, strengthen reporting, and create a roadmap for long-term success. This engagement will play a critical role in supporting fundraising, program delivery, constituent engagement, operational reporting, and organizational decision-making.

Primary Responsibilities

Salesforce Assessment & Optimization

- Assess the current Salesforce environment, including architecture, automation, permissions, integrations, and reporting.
- Identify opportunities to improve usability, scalability, and system performance.
- Recommend and implement solutions to address technical debt and inefficiencies.

Data Integrity & Governance

- Review and remediate duplicate records and data quality issues.
- Establish data governance standards and ongoing maintenance procedures.
- Improve overall confidence in Salesforce data and reporting.



Business Process Alignment

- Document business processes across programs, advancement, finance, and operations.
- Align Salesforce functionality with organizational workflows.
- Recommend improvements that increase user adoption and operational efficiency.

Integration Review & Support

- Assess existing integrations and data synchronization processes.
- Troubleshoot integration and reporting challenges.
- Partner with internal staff and external vendors to improve system reliability and performance.

Reporting & Analytics

- Review and enhance reports and dashboards.
- Improve visibility into organizational performance and key metrics.
- Develop recommendations for executive and operational reporting.

Documentation & Training

- Develop Salesforce documentation, SOPs, and governance materials.
- Provide knowledge transfer and training to designated staff.
- Create a sustainable framework for ongoing Salesforce administration.

First 30-Day Deliverable

Within the first 30 days, the consultant will deliver a Salesforce Assessment & Findings Report that includes:

- Current state assessment
- Data quality analysis
- Integration review
- Reporting evaluation
- Risk assessment
- Recommended 90-day action plan
- Preliminary 12-24 month Salesforce roadmap

Desired Qualifications

- 5+ years of Salesforce administration, consulting, or solution architecture experience.
- Experience conducting Salesforce assessments and remediation projects.
- Strong knowledge of Salesforce CRM architecture, automation, reporting, integrations, and data management.
- Experience resolving data quality, duplicate management, and reporting issues.
- Experience working with third-party integrations and technology vendors.
- Strong project management and stakeholder engagement skills.
- Salesforce Administrator Certification required.
- Experience supporting nonprofit organizations strongly preferred.
- Experience with nonprofit fundraising and constituent management systems preferred.



Final Deliverables

At the conclusion of the engagement, the consultant will provide:

- Salesforce Environment Assessment Report
- Data Governance Recommendations
- Business Process Documentation
- Integration Improvement Plan
- Reporting Enhancements
- Salesforce Documentation Library
- Standard Operating Procedures
- Salesforce Strategic Roadmap
- Staff Training & Knowledge Transfer

Success Measures

- Improved data quality and reporting accuracy
- Reduced duplicate records
- Resolution of critical integration issues
- Increased user adoption
- Documented governance and business processes
- Clear roadmap for future Salesforce administration and growth

To Apply: please submit a resume, summary of relevant Salesforce projects, and a brief description of your approach to Salesforce assessment and optimization projects to careers@civiced.org Please reference the job title in the subject line.