



# SBDC Data and Reporting Administrator

**Reports To:** Vice President, Economic Development  
**F.L.S.A.:** Non-Exempt  
**Last Revised:** January 2019

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**Summary:** Need a highly organized, detail-oriented individual to help create, track and maintain data as it pertains to Small Business Development Center (SBDC) reporting for the Norcal SBDC Lead Center, the Metro Chamber Public Policy & Economic Development department and our funding partners.

Important to have a high degree of ethics and integrity as our information needs to be accurate and is audited and presented to the Small Business Administration (SBA), elected officials, the Metro Chamber Board and the community.

Important to have a positive, professional individual that communicates well with the Metro Chamber and the SBDC team of consultants, clients and staff. Belief in our mission to serve the small business community is vital to their success.

**Function:** The SBDC Data and Reporting Administrator is responsible for the coordination of the bookkeeping, data management and administrative support functions related to the Small Business Development Center. Must be comfortable multi-tasking, able to handle phone inquiries and skilled with Microsoft Word, PowerPoint and Excel.

**Requirements:**

- Individual must be a college graduate or equivalent work experience.
- Fluent with Word processing, spreadsheet, database and presentation software.
- Ability to communicate clearly, both written and verbal; handle multiple priorities.
- Work well in a small company atmosphere as a team player.
- Strong organizational skills, detail oriented.
- Able to maintain records and prepare reports.
- Excellent interpersonal and communication skills.
- QuickBooks / Bookkeeping experience a plus.
- Familiarity with social media
- Able to perform a wide variety of general clerical duties without close supervision.
- Experience with non-profits and/or small business operations is a plus.



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SACRAMENTO METROPOLITAN  
CHAMBER OF COMMERCE



SMALL  
BUSINESS  
DEVELOPMENT  
CENTER

CAPITAL REGION

# SBDC Data and Reporting Administrator

## Primary Job Responsibilities:

- Maintain confidential client records, files and mailing lists.
- Assist in preparing monthly and quarterly client counseling reports to Lead Center for all SBDC related programs.
- Backup Program Coordinator in receiving and screening phone calls and emails, answering questions pertaining to services and programs offered by SBDC and our partners.
- Take minutes of SBDC advisory committee and consultant meetings.
- Manage input and maintenance of Neoserra database.
- Collect and verify consultant invoices confirming correct invoiced amounts, fund allocations, session reports completed and totals match to Neoserra.
- Monitor and collect time sheets and confirm hours worked.
- Review Neoserra for potential Economic Impact and communicate with Consultants as to status and retrieval of proper documents.
- Produce statistical data by Consultant as to number of clients consulted, hours spent and the potential for any economic impact.
- Implement and track Cash Receipts, Purchase Order and Expense Report policy.
  - Assist with the writing of our organizational processes and tracking metrics in line with ASBDC accreditation standards.
  - Track and record activities with affiliate partners: statistics to include consulting and workshop activities, results and monthly communications.
- Develop system for tracking referral and sponsorship activities.
- Assist with fundraising efforts including data collection, application submissions, tracking results and funder deliverables.
- Track workshop attendee's interaction with the SBDC, consulting activities and Economic Impact.
- Provide support services for SBDC Director.
- Perform other duties as assigned.
- Must be a team player and willing to engage with entire Metro Chamber team.

## Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time as needed.