



Job Description Summary

Job Title: Research and Evaluation Manager
Salary Range: \$60,000 - \$67,500
Location: Hybrid Remote*

Reports To: Director of EDP
FLSA Status: Non-Exempt
Last Revised: October 2023

**The incumbent's primary residence must be in North Carolina. Candidates who are offered the role and currently living outside the state must move to North Carolina within 3 months of starting the position. This position is classified as remote, but those who prefer a traditional office environment may choose to work from our Raleigh, North Carolina headquarters.*

WHO WE ARE. Carolina Small Business Development Fund (CSBDF) works to promote community and economic development throughout North Carolina and the surrounding regions. Our work is inspired and driven by those we serve: aspiring and existing small business owners. By helping entrepreneurs reach their business ownership dreams, we seek to grow and support an engine of local economic growth. CSBDF's model of operations has three prongs: affordable financing, comprehensive technical assistance, and evidence-based policy research. With multiple offices located throughout the state in both urban and rural areas, we offer an accessible pathway for small business success.

CULTURE & VALUES. Everything we do is driven by our core organizational values of embracing diversity, acting with integrity, promoting organizational efficiency, building institutional trust, and holding ourselves to a higher standard of accountability. These values are reflected in the fact that research staff retain complete editorial independence in all policy and program evaluation work. In doing so, CSBDF seeks to ensure all evaluation and research reports are free from institutional pressures or partisan leanings. The independence of CSBDF's research staff is safeguarded by an advisory Policy & Research Committee composed of leading university faculty and development research practitioners.

NATURE OF WORK. The Research and Evaluation Manager supports the work of the Director of Economic Development Policy to elevate CSBDF's position as an evidence-based thought leader via [research efforts](#) and [program evaluations](#) that:

- Outline the interconnected nature of community and economic development to demonstrate how small business is fundamental to the growth of regional economies.
- Highlight the unique challenges that underserved demographics and geographies face within the entrepreneurial and small business owner community.
- Assist CSBDF business units to effectively and accurately measure and report on the inputs, outputs, and impacts identified in the organization's process tracking initiative.

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- Shift the dialogue on community and economic development program evaluation towards outcome-based measurement frameworks.
- Inform organizational strategy by condensing and summarizing publicly available data on trends within the CDFI industry.

SUPERVISION. Works under the general supervision of the Director of Economic Development Policy.

ESSENTIAL JOB FUNCTIONS. *The following duties ARE NOT intended to serve as a comprehensive list of all duties performed by all employees in this classification. Shown are duties intended to provide a representative summary of the major duties and responsibilities. Incumbent(s) may be required to perform additional, position-specific duties.*

Research and Policy Analysis Functional Area

The incumbent will assist the Director of Economic Development Policy with research by writing literature reviews, conducting data analysis, and writing/editing manuscripts. CSBDF's research projects are based on the needs of partners and stakeholders. Recurring essential projects include:

- Periodically updating CSBDF's research agenda rationale and impact measurement data policies to be in line with best practices.
- Assisting with CSBDF's annual economic impact report analysis by updating data inputs and ensuring data quality.
- Conducting research for senior management and CSBDF's lobbyists to provide data which furthers the non-partisan interests of the organization and the state's small business community.
- Acts as an analytical resource and prepares educational materials as needed to keep staff updated on relevant policy issues.
- Supports the Director of Economic Development Policy in building and maintaining research collaborations with CSBDF's partners to ensure the organization is seen as an evidence-based thought leader by community and economic development practitioners and academics.
- Coordinates with all teams to help promote CSBDF's research articles, reports, and blogs to a variety of stakeholder audiences.
- Acts as a resource to all teams to help communicate data-driven stories about CSBDF's impact.
- Produces research through scholarly articles, research reports, and other publications which:
 - Outlines the interconnected nature of community and economic development, broadly defined, to demonstrate how small business is fundamental to the growth of regional economies.

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- Highlights the unique challenges that underserved demographics and geographies face within the entrepreneurial and small business owner community.
- Encourages practitioners and policymakers to reimagine the role of program evaluation in community development with an emphasis on outcome-based measurement frameworks.

Program Evaluation Functional Area

The incumbent will serve as a subject matter expert and resource for CSBDF's functional teams on practices which reinforce our commitment to meaningful, accountable, and transparent impact data collection. The Research and Evaluation Manager will work closely with the Director of Economic Development Policy regarding CSBDF's process management initiative and targeted program evaluations for high priority initiatives.

Operations Research Functional Area

As part of CSBDF's commitment to data-based decision-making, this position will work with executive management to identify and monitor trends within the CDFI industry. This includes identifying and tracking patterns through data posted on the websites of regulators and via information accessible through CSBDF's membership in industry trade groups. Based on available data, the Manager will support the Director of Economic Development Policy in providing high-level recommendations to management on benchmarks for key organizational goals.

Development and Compliance Functional Areas

The Manager will provide support for CSBDF's development staff by providing research narratives, data summaries, and impact analyses for grant proposals. The incumbent will also provide similar support for compliance reports that have research-related components or require data analysis.

Organizational Initiatives

Provides research and evaluation support to senior leaders, unit directors, and board members. Based on research and analysis, supports the Director of Economic Development Policy in making recommendations regarding organizational systems, processes, and resources.

Qualifications

EDUCATION & EXPERIENCE

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- Master's degree in public administration, public policy, economics, sociology, urban planning, or a related field.
- 2 or more years of experience in social science research and program evaluation. Experience in these areas can be shown through both professional full-time work as well as documentation of directly related volunteer experiences, internships, and/or scholarly publications authored by the applicant.
- Any combination of education and experience that can be considered equivalent to the above requirements.

KNOWLEDGE

- Familiarity with principles of research and program evaluation, especially in the context of community and economic development.
- Understanding of data collection techniques for surveys, semi-structured interviews, and focus groups.
- Knowledge of how to use basic statistical techniques (bivariate correlations, difference of means, linear regression) to analyze data.
- Fundamental awareness of how to balance impact data collection and measurement with staff capacity constraints.
- Ability to identify and condense publicly available information provided by regulators and industry trade groups.

REQUIRED SKILLS

- Intermediate skill level with Excel as demonstrated by using pivot tables and VLOOKUP commands.
- Beginner skill level with Qualtrics, or any similar online survey platform, which can be shown by utilizing it in previous work or research projects.
- Beginner skill level in data imports and conducting rudimentary analysis through Excel, R, Stata, SPSS, or any similar type of statistical package.
- Beginner skill level with Salesforce or other CRMs in terms of creating basic reports and dashboards is desired, but not required.
- Exceptional written and verbal communication skills, including the ability to simplify complex concepts in ways that can be understood by an array of stakeholder audiences.

ABILITIES

- Willingness to learn about research techniques and methodologies that may be unfamiliar. This may include completing (at the organization's expense) short online courses if needed.

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- Being able to leverage research findings by forming recommendations that can be used to improve CSBDF's outputs and short-term outcomes.
- Firm commitment to CSBDF's values of non-partisan research and data analysis.
- Adept at working independently on projects when appropriate.
- Operate on a team-based lateral organization structure.
- Maintains and supports a shared collaborative team culture in person and virtually.
- Ability to meet reasonable deadlines and prioritize workflow within a changing fast paced work environment.

BENEFITS

- **Flexible Schedule:** This position does not have set office hours. While the incumbent will be expected to attend meetings as needed with key stakeholders, the Director of Economic Development, and senior management, the work can otherwise be conducted at any time.
- **PSLF Qualifying Employer:** CSBDF is considered a qualifying entity for purposes of the federal government's Public Service Loan Forgiveness (PSLF) program. Qualifying payments made while working full-time at CSBDF count toward loan forgiveness.
- **Benefits Package:** CSBDF offers a robust medical, dental, and vision insurance package to all full-time employees.
- **Paid Time Off:** All full-time employees accrue 12 days of sick leave each year (max out at 30 days) and 15 days of vacation for the first 2 years of employment and the accrue will increase after 2 years. CSBDF observes all federal holidays.
- **Retirement:** CSBDF's 401(k) plan includes 5% matching with no vesting schedule. Employees are eligible after just 3 months of service.