



creating | building
homeowners | community

POSITION DESCRIPTION

Job Title: Program Assistant	
Reports to: Chief Program Officer	Date Revised: July 2021

POSITION SUMMARY

Under the supervision of the Chief Program Officer, the **Program Assistant** will work with the community at large and be responsible for the day-to-day scheduling, document collection, and support of NWHP educational, advising, and lending programs focused on homeownership. These programs may include: financial coaching, pre-purchase advising, foreclosure prevention, refinance analysis, homebuyer education, and lending products. The initial focus of the role will be to support new foreclosure intervention programs. This role is a benefit eligible long term temporary position with a minimum position duration of one year.

PRINCIPAL DUTIES AND RESPONSIBILITIES

Customer Relations

- Provides the first point of contact for customers and external partners for information in a timely, friendly, and professional manner.
- Supports applicants as they navigate appointment scheduling, document upload and completion of online application.
- Collects and reviews intake packet and supporting documents for all advising programs and maintains document compliance required by funding source.
- Prepares, maintains and updates client information and case notes into customer/data management systems on a timely basis, with specific attention to detail and accuracy.
- Manages schedule of advising appointments, adhering to process for customer follow-up.
- Prepares and issues group education certificates and records home purchase data into appropriate customer management systems.
- Maintains adherence to all guidelines related to the confidentiality.
- Reviews and prioritizes daily tasks based on timelines of incoming requests.
- Supports new hire training process, as assigned.
- Performs other duties, as assigned.



creating | building
homeowners | community

PRINCIPAL DUTIES AND RESPONSIBILITIES (continued)

Community Relations

- Develops and maintains effective working relationships with collaborating agencies and other industry partners leveraging relationship building opportunities, where applicable.
- Participates in internal and external committees and groups, as assigned.
- Attends outreach sessions and other events to represent NWHP and its' program as a spokesperson in a highly-professional manner, as requested.

Data Base Management/Reporting

- Creates and updates new advising files in Salesforce, Homekeeper, Box.com and/or other designated software.
- Maintains customer status and initial data entry in Salesforce.com and cross-functional projects for the advising and lending departments.
- Creates and ensures timely distribution of Salesforce.com based reporting for the Advising department and monitors availability of programmatic funding and provides updates to the public and NWHP staff.
- Reviews tracking reports and performs follow up on customer files to meet time sensitive deadlines.

Professional Development

- Attends training seminars and professional development opportunities to ensure and maintain highest level of education and advising expertise for customers.

QUALIFICATIONS

Required

- Customer focused, with strong written and verbal communication skills. Ability to adjust style and pace to meet customer or audience needs.
- Experience and ability to work in a culturally diverse community,
- Detail-orientated, with a passion to learn new skills and techniques to promote efficiency and success customer and process outcomes.
- Flexible with the ability to manage multiple tasks in high volume work environment. Work well under pressure on deadline and adapt to changing situations
- Computer proficiency – Outlook, data entry, interest to learn new skills and systems.

Desired

- Fluency in two or more languages (including English). Preferred: Somali, Karen, Spanish.
- Experience providing direct service to customers and/or delivering support programs one-on-one or group setting with strong emphasis on providing excellent customer experience
- Computer proficiency – Salesforce or other CRM



creating | building
homeowners | community

Physical and Schedule Requirements

- Work in our Saint Paul and Minneapolis offices.
- Ability to travel locally and transport educational aids to work sites in the Twin Cities metropolitan area.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the assigned and essential functions.

All employees are responsible for following applicable NeighborWorks Home Partners policies and procedures as defined by their manager or Employee Handbook.

DISCLAIMER: *The above statements are intended to describe the general nature and level of work performed by employees assigned to this position. They are not intended to be an exhaustive list of all duties, responsibilities, and qualifications. Management reserves the right to change or modify such duties as required.*

Acknowledgement

I have received a copy of this job description and understand my job duties and responsibilities.

Employee Name

Employee Signature

HR USE ONLY:	<input type="checkbox"/> Exempt	<input checked="" type="checkbox"/> Non-Exempt
	<input checked="" type="checkbox"/> Full-time	<input type="checkbox"/> Part-time (# of hours __)
	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Non-Supervisor
	<input type="checkbox"/> Permanent	<input checked="" type="checkbox"/> Temporary