

## COMMUNITY FIRST FUND TEAM MEMBER PROFILE CHARACTERISTICS, SKILLS & EXPERIENCE

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Date: 04/2021

Name: VACANT

Position/Title: Senior Technical Assistance Associate

Department: Affinity Group Lending

Reports To: AGL Manager

Salary Band: Core Operations

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### CHARACTERISTICS

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- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Adaptable and Strategic Leader
- Ethical
- Goal Oriented
- Outgoing
- Inclusive
- Motivational
- Conscientious
- Self-starter
- Self-awareness
- Learning mindset
- Performs well in a fast paced work environment
- Supportive
- Curious
- Creative
- Customer Focused

### SKILLS

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- Bilingual, Spanish speaking (must be proficient).
- Ability to work effectively with racially and socially diverse individuals.
- Proficiency in Microsoft Products; with strong skills in Excel.
- Capacity to learn departmental software systems and databases, including but not limited to Customer Relationship Management software, On-line application (SPARK), The Exceptional Assistant (TEA) and cloud-based programs like Microsoft 365 and Power BI.
- The ability to maintain a high degree of accuracy and attention to detail.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Ability to work independently.
- Public speaking

### EXPERIENCE

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- 3 – 5 years' experience in business consulting or credit counseling

- Associate's Degree in the field of finance or business
  - 3 – 5 years' experience coordinating and conducting adult learning opportunities
  - Customer service experience
  - Knowledge of budgets and financial action plans required
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**ROLE:** The Affinity Group Lending Senior Technical Assistance Associate works closely with the Affinity Group Lenders to ensure that clients are increasing their financial capacity through regular follow-up meetings, educational workshops, individual and group support. Connects clients with appropriate resources and assists in the determination of eligibility for a variety of public programs. Assists clients with the development of personalized financial action plans and assists them in the achievement of their financial goals.

**RESPONSIBILITIES:**

1. Technical Assistance
2. Financial Planning
3. Training
4. Program Reporting
5. Individual, Team and Company Participation

**EXPECTATIONS:**

**1. Technical Assistance**

- Work with Affinity Group Lenders to determine specific needs of individual clients
- Develop and oversee the technical assistance programs for the Affinity Group Lending team
- Work with borrowers individually and in a group setting to identify challenges and areas for improvement
- Analyze eligibility for a variety of city, state, and federal programs
- Make referrals for appropriate resources and follow-up on the outcome of each referral
- Conduct regular follow-up meetings throughout the term of the client's loan

**2. Financial Planning**

- Analyze credit, budget, and financial goals.
- Develop action plans for individual clients to increase their financial capacity.
- Monitor borrowers for progress

**3. Training**

- Develop a program of training through educational workshops.
- Coordinate and deliver workshops.
- Assist adult learners in their understanding of learning objectives

**4. Program Reporting**

- Track data required for compliance
- Provide program reports as directed

**5. Individual, Team & Company Participation**

- Quarterly Coaching Sessions and Annual Review
- Department Meetings
- Opportunities Meeting, Quarterly Business Meeting, etc.
- Participate in training, assessments and surveys as directed

- Special Events Attendance & Support

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 25% of the time. Employee must have transportation in order to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

*The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*