



COMMUNITY FIRST FUND TEAM MEMBER PROFILE CHARACTERISTICS, SKILLS & EXPERIENCE

Date: August 2021

Name: Vacant

Position/Title: Program Compliance & Impact Associate

Department: Development

Reports To: Program Compliance and Impact Manager

Salary Band: Core Operations

CHARACTERISTICS

- Detail-oriented
- Goals-oriented
- Conscientious
- Ethical
- Curious
- Innovative
- Relational
- Customer Focused
- Efficient/Organized
- Methodical
- Analytical
- Logical
- Self-motivated
- Performs well in a fast-paced work environment

SKILLS

- Proficiency in Microsoft Products; strong ability in Excel
- Capacity to learn departmental software systems and databases, including but not limited to Customer Relationship Management software, SPARK, The Exceptional Assistant (TEA) and cloud-based programs like Microsoft 365 and Power BI.
- Demonstrates a high level of accuracy and excellent attention to detail.
- Strong analytical ability; strong organizational skills.
- Ability to quickly research and distill information into a format that is easy to understand.
- Ability to efficiently manage concurrent projects and competing priorities.
- Ability to work both independently, with minimal supervision, and in a team environment.
- Ability to work effectively with racially and socially diverse individuals.
- Strong written and verbal communication skills.
- Ability to relate well to clients, funders, vendors
- Bilingual (Spanish/English) preferred

EXPERIENCE

- Bachelor's degree or commensurate experience in community development, public policy, business, accounting, or data related fields.



ROLE:

The Program Compliance & Impact Associate is responsible for coordinating Community First Fund's Annual Client Survey, conducting research to aid in applications for funding, and manage data collection, analysis, and reporting for Community First Fund's New Markets Tax Credits program.

RESPONSIBILITIES:

1. Annual Client Survey
2. New Markets Tax Credits Impact Data Collection and Management
3. New Markets Tax Credits Reporting
4. Research for Grant and Investment Applications
5. Administrative Duties
6. Individual, Team and Company Participation

EXPECTATIONS:

1. **Annual Client Survey**
 - a. Reach out to a vetted list of Community First Fund borrowers to obtain annual impact survey information.
 - b. Conduct annual survey of QALICB entities and commercial tenants at NMTC projects
 - c. Analyze and present survey data, enter into appropriate database systems (TEA, CRM).
 - d. Work with Program Compliance & Impact Manager to annually review and improve survey questionnaire and process. Update survey infrastructure as needed.
2. **New Markets Tax Credits Impact Data Collection and Management**
 - a. Update the NMTC Impact Report Card and other databases upon receipt of impact information for new or existing projects.
 - b. Quality control completed questionnaire and NMTC Impact Rating Tool for each prospective NMTC transaction.
 - c. Conduct surveys of projects in the NMTC pipeline for annual application.
3. **New Markets Tax Credits Reporting**
 - a. Collect data from QALICBs and relay to investors, the CDFI Fund, and other entities.
 - b. Maintain professional relationship and clear communication with NMTC reporting contacts.
 - c. Monitor compliance with NMTC regulations and notify VP of NMTC of any concerns.
 - d. Assist in conducting annual NMTC notice of non-compliance training.
 - e. Coordinate annual submission of Institution Level Report (ILR) and Transaction Level Report (TLR) to the CDFI Fund.
 - f. Prepare materials and take minutes for NMTC Committee Meetings.
4. **Research for Grant and Investment Applications**
 - a. Develop and maintain calendar of regular funding application due dates.
 - b. Coordinate with VP of Development to ensure timely completion of data requests.
 - c. Maintain an organized library of third-party research for use in grant applications.
 - d. Reach out to prospective or existing projects to obtain information for applications.
 - e. Develop and regularly maintain datasets to aid with funding applications.



5. Administrative Duties

- a. Assist Impact Team with collection of outstanding information and serve as a backup for impact Quality Control tasks.
- b. Maintain the NMTC Compliance Calendar, identifying all reports due for the next 12-24 months (rolling calendar).
- c. Update and add contact information in Customer Relationship Management system.

6. Individual, Team & Company Participation

- a. Quarterly Coaching Sessions and Annual Review Meeting
- b. Department Meetings
- c. Loan Committee
- d. Opportunities Meeting, Quarterly Business Meeting, Sales Rally
- e. Support the projects that advance our Strategic Plan goals and Operational plan goals; participate in at least one Annual Operational Plan Objective project team.
- f. Participate in training, assessments and surveys as directed
- g. 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 10% of the time. Employee must hold a driver's license and able to drive, and able 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.