

COMMUNITY FIRST FUND TEAM MEMBER PROFILE

Date: 09/2021

Name: Vacant

Position/Title: Program Compliance and Impact Manager

Department: Development Reports To: VP, Development

Salary Band: Management and Supervision

CHARACTERISTICS

- Adaptable and Strategic Leader
- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Ethical
- Goal Oriented
- Responsible
- Conscientious
- Communicative
- Detail oriented
- Performs well in a fast-paced work environment
- Coach
- Curious
- Creative
- Demonstrated Initiative

SKILLS

- 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, SPARK, The Exceptional Assistant (TEA) and cloud-based programs like Microsoft 365 and Power BI.
- Strong capability in contract management.
- The ability to maintain a high degree of accuracy and attention to detail in a high paced setting
- Strong supervision abilities with the capability of setting clear expectations and maintaining team accountability.
- Strong analytical, time management, and organizational skills and the capacity to integrate diverse objectives with a high level of attention to detail including managing multiple deadlines.
- Ability to work effectively with internal staff, board members, funders, and other organizational stakeholders.
- Strong written and verbal communication skills.
- Ability to work effectively with racially and socially diverse individuals.

EXPERIENCE

- 5-8 years of professional experience in data analysis, contract management or non-profit compliance related fields.
- At least 3 years of supervisory experience.
- Bachelor's degree or commensurate experience in business, finance, or data related fields.

ROLE:

The position of Manager, Program Compliance and Impact supports all aspects of the organization's program compliance and impact monitoring activities. The Manager ensures that all functions within the department are adequately staffed and performing at a high level to meet the growing needs of the organization. The Manager monitor and analyzes organizational activity to assess that the organizational activities both remains compliant on existing contracts as well as advances our mission through impact analysis. Specific oversight for program compliance includes working with staff to ensure the timely and accurate contract activity monitoring and reporting for all funders (both public and private), maintaining the corporate compliance tracking systems. Specific oversight for impact data collection and analysis includes working with staff to collect, maintain and analyze data for use in internal and external impact reports, and maintaining the organization's impact measurement system. The Manager plays a key role in program impact monitoring and analysis. In addition, the Manager is an important part of the capital management processes including the monitoring activities against established goals and benchmarked impact measurements. In addition, the Manager contributes to on-going activities necessary to meet goals set forth in Community First Fund's Strategic Plan, and supports Executive Management, Development, Finance and Lending staff with selected reports and duties as assigned.

RESPONSIBILITIES:

- 1. Department Management Responsibilities**
- 2. Supervisory Requirements**
- 3. Systems and Documentation Oversight**
- 4. Individual, Team & Company Participation**

EXPECTATIONS:

- 1. Department Management Responsibilities**
 - a. Manage all department workflows, functions and responsibilities ensuring they meet the needs of the organization
 - b. Maintain a strong impact culture and be a steward for impact data and related analysis across the organization
 - **Oversee impact data collection processes and systems**
 - Manage data collection and maintenance processes to ensure data integrity, accuracy and completeness
 - Oversee client, tenant and beneficiary survey processes
 - Oversee timely and accurate input of impact data to data tracking reports and tools including Impact Rating Tool and Impact Report Card
 - Implement quality control procedures and best practices
 - **Manage and implement organizational and program impact analysis**
 - Assess organizational impact including mission alignment, immediate impact, analysis of longitudinal impact and change over time using both internal data and third party data
 - Set key benchmarks and analyze impact trends
 - Manage any third-party data collection processes and third-party reviews/studies
 - **Manage the reporting and communication of impact data and analysis for both internal and external audiences including:**

- Impact Committee
- Departmental and organizational needs
- Board and Governance needs
- Aeris Impact
- Ensure consistency in training to staff in all departments on impact related data input, impact collection and rating procedures
- Develop new tracking reports or tools as needed
- Provide data, reports and materials for Development and Management Teams for funding proposals and legislative/stakeholder meetings as needed
- Manage the Operations Plan for Impact and participate in Annual Strategic Planning
- c. Maintain a strong capital management culture and sound program compliance function
 - Manage all program compliance processes and procedures
 - Maintain a thorough and in-depth knowledge of all active grant, investment and New Market Tax Credit (NMTC) agreements and contracts
 - Manage onboarding processes for new fund and other programmatic contractual obligations to ensure appropriate compliance monitoring and processes are in place
 - Ensure the corporate reporting calendars accurately reflect the requirements of investors, grantors, donors and other stakeholders
 - Coordinate both internal and external reporting requirements and data collection to ensure relevant, accurate and timely submission of all reports
 - Maintain accurate and timely reports to indicate funding/contract status that reflects contractual obligation against actual activity
 - Analyzes actual and projected activities to ensure compliance on all funding/contracts
 - Manage the internal reporting and communication of fund/contract compliance status including reporting to:
 - Lender’s Meeting
 - Staff Finance Committee
 - Executive and Sr. Leadership Teams
 - Develop new tracking reports or tools as needed
 - Prepares for and attends periodic monitoring meetings/site visits conducted by funding agencies

2. Supervisory Requirements

- a. Provides day to day supervision, training and evaluation to members of the Program Compliance & Impact team including setting and maintaining clear expectations and performance standards
- b. Provides regular coaching and monitoring meetings with each team member
- c. Provides annual Performance Planning processes to Compliance and Impact Team
- d. Manage department interns (as needed) including creating work plans, providing training and resources and monitoring activity
- e. Ensures all staff are adequately trained to perform requisite duties
- f. Provides inspirational leadership consistent with our mission

- g. Adheres to supervisory requirements including recruitment, coaching, training modeling the company culture, and other policy and performance oversight

3. Systems and Documentation Oversight

- a. In conjunction with IT support, ensures database systems and software programs meet the data tracking, reporting and analysis needs of the Compliance & Impact team and organization
- b. Ensures new reports are developed and maintained as needed
- c. Ensures all document files are maintained for grants, investors and other stakeholders, according to procedures
- d. Ensures documentation of Program Compliance and Impact procedures (Standard Operating Procedures) are complete and are updated regularly to reflect current processes.

4. Individual, Team & Company Participation

- a. Quarterly Coaching Sessions, Annual Performance Plan Meeting and regular staff one on one check in
- b. Department Meetings
 - Impact Committee: With guidance from the Committee's chair
 - Creates agenda
 - Maintains schedule
 - Prepares materials
 - Ensures meeting minutes are taken
 - Development Department Monthly Meeting: In conjunction with other Development Department leadership participate in and lead monthly team meeting
 - Ensure Compliance and Impact materials are prepared as needed
 - Monthly Lender's Meeting
 - Prepare and present relevant materials
 - Investor/Legislative Meetings: on an as needed basis, coordinate materials as required
- c. Opportunities Meeting, Quarterly Business Meeting, and Supervisory Meetings
- d. Operational Plan Monthly Progress Meetings
- e. Participate in training, assessments, and surveys as directed
- f. 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 15% 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.