

**Job Description:  
Program Associate**

**Status:** Non-Exempt, Full-Time, In-Office  
**Supervisor:** Senior Investment Officer  
**Revised:** 9/11/2023

**Position Purpose:**

The Program Associate provides front line support to applicants and borrowers, supports the program teams with daily tasks, projects, and off-site errands, and maintains the safety and security of the office

**Essential Functions:**

The Program Associate provides the warm first impression to our clients and applicants that sets the stage for our client-focused approach to our work. This team member proactively assists each of the program teams by connecting them with clients, and providing daily support in the achievement of our mission

**Job Duties:**

**GENERAL OFFICE SUPPORT**

- Greets clients and provides a warm handoff to program officers; offers hospitality to client; provides exceptional client service in person, by phone, and by email
- Ensures all inquiries and communications are managed kindly and efficiently
- Enforces strict safety protocols by managing secure access to the building
- Maintains all client spaces in clean and orderly condition

**INVESTMENT TEAM SUPPORT**

- Fills out and submits inquiry forms for new clients making contact by phone or email
- Performs basic client screening, informing clients of suitable products and services, and scheduling intakes with investment officers
- Accepts and accurately routes loan applications and supporting documents to investment officers
- Maintains the applications@ email inbox, responding to and routing messages as appropriate, with the same level of professionalism and kindness expected with all client interactions

**PORTFOLIO TEAM SUPPORT**

- Accepts client payments, provides receipts, accurately fills out associated documentation, submits documentation to portfolio team, and places payments in safe
- Prints and mails communications and documents, which may include driving to the post office for certified mailing
- Perfects collateral at the Department of Motor Vehicle and County Clerk and Recorder's office

- Prepares loan closing documents
- Notarizes loan closing documents as needed

**BUSINESS CONSULTING TEAM SUPPORT**

- Maintains the calendar of Technical Assistance events
- Updates organizational contacts lists
- Provides basic technical assistance to clients

**COMMUNICATIONS TEAM SUPPORT**

- Orders print collateral at the direction of the Communications team
- Maintains print collateral and communications supplies in good order
- Checks event kits in and out, ensure kits are full stocked at check in, and maintains inventory of materials

**OPERATIONS/FINANCE TEAM SUPPORT**

- Schedules outside vendors to provide service and support at the direction of the Operations team
- Monitors copier and hospitality supplies
- Manages logistics of in-office events including team lunches, meetings, and celebrations, as well as partner events
- Places orders for office supplies and maintains inventory in an organized manner

**OTHER DUTIES**

Manages other duties as assigned by Executive Director and direct supervisor