



Program Assistant - Portland Job Description

SUMMARY

The Program Assistant provides high quality, warm customer service, ensures accuracy and timely entry of customer intake and purchase information in agency database administrative support for the homebuyer education and counseling program.

Supervisor: Homeownership Program Director

MAJOR RESPONSIBILITIES

Customer Service and Scheduling

- Serve as professional, welcoming, resourceful initial point of contact for agency.
- Respond promptly and professionally to customer and community inquiries by phone, email, and in person. Manage Acuity scheduling system and OT Activities for all classes, appointments and provider availability.
- Provide information and referral about all agency services, including cross selling agency services as appropriate.
- Maintain professional and neat, inviting front office area.
- Ensure that inquiry calls and emails are returned within one business day.
- Serve as the primary point person for the agency customer online scheduling system.
- Coordinate the scheduling of customers for in-person and online classes and appointments.

Customer Intake and File System Management

- Track and coordinate customer registrations, both online and in-person.
- Ensure that online customer registrations are accurately uploaded to OT based on volume every 2-3 business days to the agency data base.
- Maintain pipeline of clients without assignment to counselor through re-engagement attempts, scheduling emails and inactivations as necessary.
- Pull and document customer credit reports in electronic files.
- Maintain electronic record of fees collected from customers.
- Maintain department server folders and electronic file management system.
- Establish, maintain, and update files, databases, records, and/or other documents for recurring internal reports.
- Ensure customer privacy and security of electronic files.
- Create regularly weekly, monthly and quarterly reports of active clients for counselor follow-up and support in follow-up activities as needed for counseling staff.

Workshop Administrative Support

- Oversee processing and administration of, in-person and online classes, workshops, and other events including ensuring registration confirmations, timely reminders, and follow up emails after course completion. Support client registration and scheduling as needed for Admin Assistant.
- Keep electronic records of workshop sign in sheets.
- Enter class attendance information into agency database within one business day of class.
- Send online workshop evaluations to attendees within one business day of course completion.

Director Support

- Quality Control and Audit Preparation: Maintain hard copy of client file audits and follow up with individual Counselors for feedback on audit findings as needed. Maintain and assemble HUD Audit Binder as each section is completed by Director. Oversee hard copy of educational group file audits and perform quarterly quality control checks in assistance with the Director and the Admin Assistant.
- Assist in the planning and scheduling of department events.
- Assist with the compilation of information, research, and outreach for class and program development.
- Assist in the development and execution of department procedures and protocols
- Partner Education Program: Work with Director to manage partner agreements, registration process and program development. Be the point of contact for administrating the program, training schedule and follow-up.

Data Entry and Home Purchase Documentation

- Document all customer contacts in customer database.
- Respond to requests for certificates of home buyer completion in a timely manner.
- Enter required home purchase information in agency database.
- Store and archive closed customer electronic files as appropriate.
- Provide data entry into various databases.

Operations and Finance Administrative Support

- Maintain department server and file protocols.

Backup Support (as needed)

- Frameworks Management: Registration processing, client tracking, document retrieval, scheduling of counseling appointments and release of certificates.
- PHC General Inquiries through the admin email account
- Front desk management
- Class Prep & Processing: Class materials, reminder emails, OT processing and management of group education audit binder
- Check Log

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:

1. Bachelors Degree and at least 2 years of experience that is directly related to the duties and responsibilities specified.
2. Ability to provide excellent customer service in person and on the phone.
3. Ability to handle multiple tasks, frequent interruptions, and stressful situations with calmness and courtesy.
4. Ability to communicate effectively, both orally and in writing.
5. Excellent records, file management and organizational skills.
6. Knowledge and experience using MS Word, Excel, Outlook and PowerPoint.
7. Ability to organize and coordinate multiple events.
8. Ability to maintain calendars and schedule appointments in Microsoft Outlook.
9. Basic knowledge of accounting principles preferred.

Performance Measures for Major Responsibilities:

- Work cooperatively with Portland Housing Center staff to accomplish organizational goals.
- Adhere to organizational policies and procedures and identifying new organizational efficiencies.
- Promote and effectively cross sell the Portland Housing Center and its services.
- Foster a multi-cultural and multi-ethnic team environment.

Working Conditions

Normal office environment. Occasional standing for long periods of time. Some lifting required (20-40 lbs). Ability to work evenings and occasion weekends. Travel to other training locations periodically required.

October 2017

Non-exempt position