



Executive Assistant - Capital Solutions

San Francisco / Oakland

June 2022

WHO WE ARE

Communities on the margins of opportunity deserve a trusted partner on their journey towards financial growth and stability. As a locally invested, collaborative partner in social justice and financial equity, Community Vision provides nonprofits, small businesses, and social enterprises with strategic investment and guidance, to deepen work, scale impact, and strengthen our communities.

We know that supporting community-owned and community-governed projects creates shared prosperity and builds collective, and self-directed, economic and political power. This position will put you at the forefront of exciting organizational growth and the re-envisioning of how we carry out our work; creating greater efficiency internally and deeper impact externally.

Community Vision is dedicated to anti-racist practices and to building an anti-racist organization. This includes treating colleagues with respect, supporting the vision of the organization, and acting as ambassadors of [our values](#).

THE OPPORTUNITY

The **Executive Assistant** is primarily tasked with providing administration and operations support to the loan processing operations of the organization. It includes the setting up of each loan file in Community Vision's central loan origination system (LOS). This person works directly with the VP, Capital Solutions, as well as with loan processors / underwriters in the organization.

The Executive Assistant will prepare internal and external reporting and data analysis for the organization's entire lending portfolio, including but not limited to general loan portfolio loans, New Market Tax Credit loans and specialized fund loans. They will produce monthly, quarterly and annual loan portfolio reporting as needed, and perform necessary maintenance and entries as required by loan modifications, deferrals, new and renewed transactions.. The Administrative Assistant will play a key role in ensuring that Community Vision delivers excellent service, reporting and data analysis to other departments, investors, loan committees, Board of Directors, amongst others, as required.

WHAT YOU WILL DO

- Provide administrative support to the VP, Capital Solutions, and technical assistance to the loan processing operations of the company.
- Assist in the organization and maintenance of all loan documents for all loan files.
- Processing paperwork, new applications, title certificates, clear to close packets, and ordering appraisals for underwriters.
- Under the direction of the VP, Capital Solutions, manages the schedule for reports that are required for internal credit and accounting purposes (i.e. Portfolio reporting, collateral reporting, etc.) as well as internal organizational reports related to lending and credit as required by the Lending, Finance, Consulting and External Relations departments.
- Manage the reporting schedule for NMTC related reports (i.e. CBA reporting, CIIS reporting alongside asset management, accounting, credit peers, etc.).
- Produce monthly, quarterly and/or annual reports in accordance with Community Vision's loan servicing obligations to its capital partners and/or investors.
- Enter data into any required federal database as required in order to manage any federally regulated programs (i.e. NMTC, HFFI, etc.).
- Provide support to the Loan Administration team in preparing and distributing monthly or periodic loan and NMTC-related invoices to Borrowers or partner organizations.
- Provide support to the VP, Capital Solutions in maintaining the quality control of the departmental systems (Salesforce, TEA, Sageworks, etc.) and ensure consistency of data entered by staff in an effort to maintain accurate reporting data.
- Assist the VP, Capital Solutions in the maintenance, compilation, analysis and organization of data necessary for them to carry on their work, including both internal analysis and information to support their work with potential investors or their efforts to partner with other organizations.
- General office clerical duties.
- Manipulating spreadsheets.
- Creating Word documents, mail merge.
- Organizing and scanning files.
- Provide assistance on any special projects as directed by the VP, Capital Solutions.

WHO WE ARE LOOKING FOR

Ideal qualifications

- BS Degree in Business or Accounting or its equivalent in related experience.
- At least 2+ years of experience in a community development-related role.
- Demonstrated experience in MS Office, specifically Word and Excel. May require database management skills with the ability to produce reports.
- Ability to use advanced computer functions including navigating the Internet, ability to manipulate, analyze and interpret data.
- Demonstrated experience using any loan origination system (LOS).
- Proven organizational skills and attention to detail.
- Proven ability to organize priorities, meet deadlines, and manage peak periods of activity while maintaining related paper records.
- Ability to exercise discretion and maintain confidence.
- Work and communicate with a wide range of people in multiple phases of the loan process. Work in partnership with other companies (realtors, appraisers, escrow officers, etc.).
- Self-starter and able to initiate new tasks.
- Ability to produce professional quality work that meets agreed upon standards and deadlines.
- Excellent customer service, organizational, verbal and writing skills.
- Experience with Salesforce and Sagemworks is a plus.

MORE ABOUT THE POSITION

The **Executive Assistant** is a full-time non exempt position. This position reports to the Vice President of Capital Solutions. The salary for this position is between **\$29 - \$35** hourly, depending on experience. Benefits include: 100% health insurance premium coverage for employees and a contribution towards dependent coverage, dental insurance, long-term disability and life insurance, transportation and cell phone subsidies, employer contributions towards retirement savings, three weeks' vacation, and a commitment to work/life balance. Occasional evenings and out of area travel may be necessary. The position involves regular computer and telephone use plus some minimal lifting. The position can be based at either of Community Vision's offices in San Francisco or Oakland. All staff are working remotely until further notice.

TO APPLY

Send resume and cover letter via email to theo@thenorfusfirm.com. Subject line should read: **Executive Assistant**. Cover letters should discuss your interest in the position and in working at Community Vision. Position will remain open until filled.

For more information on our programs and services, please visit our website at:
communityvisionca.org.

Community Vision is an equal opportunity employer and is committed to providing applicants and employees with a diverse, equitable and inclusive environment free of discrimination and harassment. All employment decisions at Community Vision are based on business needs, job requirements and individual qualifications, without regard to age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), sexual orientation, or any other status protected by the laws or regulations where we operate. Community Vision will not tolerate discrimination or harassment based on any of these characteristics and encourages applicants with these characteristics to apply.