



**Towards Employment**

**POSITION:** Program Associate – Financial Opportunity Center  
**Reports to:** Program Manager Training Services  
**Positions Supervised:** None

**BACKGROUND:**

Towards Employment is a national leader in workforce development. We connect people to careers which change people’s lives, advances businesses, and strengthens community in Northeast Ohio. Founded in 1976, Towards Employment has gained local and national recognition for achieving excellent outcomes through the hard work of its dedicated staff. At Towards Employment we value critical thinking, intellectual curiosity, open communication, and collaboration. We embrace diverse perspectives, have a collective passion for the work we do and a curiosity to find new and better solutions. As a staff, we work towards achieving our organizational vision - an equitable workforce system where racial income gaps have been eliminated and everyone, especially those most affected by systemic racism, has access to family-sustaining wages and quality jobs.

**POSITION OVERVIEW:**

Towards Employment offers a continuum of support to low-income individuals preparing to enter the workforce or looking to advance from low-wage employment while also fulfilling the staffing needs of local employers. The Financial Opportunity Center Program Associate works with our Financial Opportunity Center coaching staff to provide overall administrative support.

**General Duties:** Support the overall Financial Opportunity Center through timely and accurate data collection, data entry, and frequent reporting to ensure program and participant success. Duties focus around the administrative and clerical tasks necessary for quality program operations including hard and electronic case file maintenance and general program needs. Works with supervisor on assignments as required.

**RESPONSIBILITIES**

- Maintain accurate and timely documentation of participants and program activity in compliance with TE policy and funder performance requirements.
- Responsible for data entry in required data systems including Towards Employment’s Commence system. May be required to enter data in other systems as required by funders for participant tracking against contracts, specifically Salesforce.
- Enter applications for new and returning participants in Commence and Salesforce.
- Coordinate and send out correspondence on behalf of participants, including letters to creditors and credit bureaus, according to TE template.
- Support the Financial Career Coach in managing calendar by scheduling appointments with participants. Work with the Program Manager Training Services to ensure data reporting needs are met.
- Set up hard case files for documentation.
- Ensure FOC data is updated and correct by the 3rd business day of each month, so that required reports can be produced in a timely manner. Work with supervisor and in

consultation with the Sr. Manager Data Analytics to update participant program status and other data related needs as they relate to programming.

- Work with Sr. Manager Data Analytics to review data for accuracy and provide information for monthly contractor progress reports as needed.
- Maintain paperwork and documents that relate to intake and review file for completeness to assure positive results on any file audits from funder.
- Do initial intake screening on individuals expressing interest in the program.
- Participate in rotation of back up support to Front Desk/Reception.
- Case notes regarding all contact will be input within 24 hours of the contact.
- Commence services and records in Salesforce will be input by the 3rd business day of every month.
- Maintain program file system in an efficient organized manner ensuring all files are accounted for at all times, contain all required documentation and are accessible as needed.
- Perform all other duties as required or requested from supervisor or Director of Programs. May also perform duties as requested by the Executive Director.

**Qualifications:**

- Must be results-oriented, self-starting, assertive, outgoing, and willing to learn.
- Minimum of a high school diploma with two years additional training in Business Secretarial Science and two years applied experience preferred.
- Previous experience in a Social Service setting contributes to knowledge of the field.
- Must have proficiency with computers, including Microsoft Office, Internet and email. Strong understanding and knowledge of database reporting systems.
- Strong attention to detail is required.
- Ability to function with minimum supervision and with all levels of staff is needed.
- Good interpersonal, telephone skills, and must possess good written and verbal communication skill.
- Strong organizational, time management, and problem-solving skills.
- Commitment to our mission and values
- Ability to work independently, be flexible and dependable, and demonstrate initiative and creativity.

**Computer Skills**

- Proficient with computers, including Word, Excel, Power Point, Publisher, Outlook, and Internet. Experience and knowledgeable with electronic case management tracking systems (databases).

**Language Skills**

Ability to write routine reports and correspondence.

**Work Environment**

Work is performed in an office setting.

**Competencies**

Success in this position also requires:

- **Continuous Improvement** – Committed to learning, development, assessment, and measurement to continuously improve.
- **Coaching Capacity** – Ability to provide guidance and to support the advancement of others.
- **Team Builder** – Leads others through collaboration, influence and managerial strength.
- **Social Justice Advocate** – Passionate about promoting racial equity and inclusion at personal, organizational and systems level.
- **Growth Mindset** – Embraces a culture of continuous learning and a can-do attitude, readily adapts to change, is intellectually curious and a critical thinker.