

Job Title: Administrative Associate

Organization & Mission

Founded in 2005, Compass Working Capital, Inc. (“Compass”) provides financial coaching and savings programs that empower working, low-income families to build assets, achieve their financial goals, and become financially secure. Our broader vision is to build a leading, nonprofit financial services organization that promotes economic mobility and financial security for working poor families by influencing field-related practice and policy.

Compass is a dynamic, growth-oriented organization that values entrepreneurship, innovation, and excellence. A key element of the Compass culture is an unshakable belief that families of low income deserve high quality financial services. This belief is accompanied by a willingness to go above and beyond in providing these services to our clients.

Position Description and Responsibilities

The Administrative Associate supports the Boston office with a broad range of duties, including preparing for client appointments, completing data entry, providing administrative support, and supporting special projects. The Administrative Associate will play a key role in ensuring smooth and efficient operations within the organization and will support the delivery of high-quality services to Compass clients.

The ideal candidate will have:

- A high level of professionalism and maturity when interacting with diverse populations
- A demonstrated interest in serving low-income families
- Absolute precision and extraordinary attention to detail
- A willingness to pitch in on any and all tasks required to support the office
- Professionalism in the workplace, particularly around client confidentiality
- The ability to learn quickly and adapt in a fast-paced environment
- The ability to prioritize and manage multiple tasks
- At least 1 year of professional office experience
- Familiarity with Salesforce and Microsoft Outlook
- Fluency in Spanish, Haitian Creole, Amharic, Vietnamese, Mandarin, or Cantonese is a plus

Primary areas of responsibility include:

Preparation for Client Appointments (approximately 70%)

Providing high quality services to our clients is central to the Compass mission, and the work that goes into preparing for client appointments is of paramount importance. The Administrative Associate will be the point person responsible for preparing client files before a coach steps into a client meeting, ensuring seamless execution between our data collection and client service. Tasks include:

- **Credit Reporting:** Pull credit reports for clients, enter data into the online portal, file in the appropriate locations, and enter data into Compass’s proprietary databases and client profiles.
- **Client Appointment Preparations:** Enter client profile information into Salesforce, prepare goals sheet for each client, and prepare other information to build client profiles.
- **Document Storage:** Prepare individual files for clients, manage storage of all supporting documentation, and scan contracts and other documents into the Compass system.
- **Client Relations:** Coordinate client appointments, reach out to clients on missed or upcoming appointments and events, prepare client welcome packets prior to first coaching meetings, and answer phone calls.

Outreach (approximately 10%)

Generating awareness for the Compass program is a critical component of program success. Tasks in this category will include:

- **Print Campaign:** Assist in preparing mailings for ongoing outreach, assure timely delivery and payment for mailings at the Post Office, and keep track of errors on the mailing list.
- **Collateral Preparation:** Print and organize flyers, handouts, folders, and other materials for Orientations and Workshops.
- **Phone Outreach:** Assist the program manager in contacting prospective clients in regards to upcoming Orientations and Workshops.
- **Workshop Preparation:** Assist in scheduling workshops, booking locations and instructors, ordering food and supplies, and setting up materials for Orientations and Workshops.

General Administrative Support (approximately 15%)

As a key member of a small but growing team, this individual's responsibilities will include a variety of tasks that will support both the senior leadership team and the general operations of the organization. This is an exciting time of growth at Compass, and this position will provide an opportunity for exposure to the day-to-day operations of a fast-paced, non-profit, social justice organization, including:

- Assist with hiring process. Tasks may include:
 - Posting on various job boards
 - Oversee Compass' primary email portal for applications
 - Scheduling candidate phone screens and interviews
 - Track, maintain, and organize incoming candidate application submissions
- Document management
- Operational activities, including general reception desk management, greeting clients, ordering supplies, technology setup etc.
- Schedule and travel coordination
- Meeting coordination and follow-up
- Maintenance of office presentation
- Other tasks as necessary

Special Projects (approximately 5%)

This activity could take many forms as the organization grows and as the associated needs and activities evolve. Examples of special projects could include a marketing campaign project, data analysis, or preparation for key deliverables to partner agencies.

Additional Information

- This is a full-time, non-exempt position based in our downtown Boston location. This position is for 40 hours per week. Our typical business hours are from 9am – 5pm with a lunch break.
- Compass is located in Boston's financial district at The Nonprofit Center, the first mission-based, multi-tenant center in Massachusetts created exclusively to house progressive social change organizations.
- For more information, please visit our website, www.compassworkingcapital.org.
- To apply, please send a thoughtful cover letter and resume as PDFs to apply@compassworkingcapital.org with "Administrative Associate Application" in the subject line. Incomplete submissions will not be considered.