

About Windmill Microlending

Windmill supports immigrants, including refugees, who arrive in Canada with professional skills but who need Canadian accreditation to work in their field. Lacking the financial resources to pay for their training and licensing, they often fall into low paying “survival” jobs to make ends meet. Without income, collateral or credit history, it is difficult, if not impossible, for them to access financing and reach their professional goals.

Windmill addresses this problem by providing micro loans of up to \$10,000 to internationally trained immigrants so they can obtain the Canadian licensing or training they need to work in their field. Since 2005, Windmill has provided \$25 million in loans to 3,800 immigrants across Canada from a wide range of occupations. The impact of a Windmill loan is profound:

- **The income of skilled immigrants is tripled.** With the help of a \$7,000 loan, the average loan doubles or triples the recipient's income.
- **The contributions of skilled immigrants to the Canadian economy multiplies exponentially.** Every \$1 invested in Windmill returns \$15 for the Canadian economy in the first year after a borrower completes their learning plan. Loan recipients increase their tax contribution by four times.
- **Canadians, as a whole, benefit** when immigrants are able to put their skills to work in Canadian communities, particularly where there are skill shortages. 75% of loan recipients have found work in their field, most commonly as medical professionals, engineers or in the financial industry.

Windmill is the only national organization providing micro loans to skilled immigrants.

In the past decade, Windmill has grown from a grassroots organization in Calgary approving seven loans in its first year, to a national organization approving 665 loans in the past year. With over 180,000 skilled professionals entering the country each year, Windmill is working towards serving thousands of skilled new Canadians each year.

Position Description

Windmill Microlending is seeking a full-time Manager, Intake and Data Collection. This role has been created to provide effective oversight and direction to the Intake team. The Manager, Intake and Data Collection will play a key role in achieving Windmill's goals of 1) Increasing the employment outcomes and average annual income differential of loan recipients who have completed their learning plan, over the mid to long term 2) ensuring that Windmill's default rate stays below the thresholds set by the Board, and 3) increasing the number of loans delivered, ideally meeting or surpassing targets. This role reports to the National Director, Client Success.

The Manager, Intake and Data Collection will play an important role in supporting significant growth and organizational change at Windmill, where the environment is fast-paced and entrepreneurial. This role contributes to the attainment of Windmill's mission, and exemplifies the values of passion, empowerment, simplicity, and results in all he/she does.

Key Responsibilities of the Role:**Intake Team Development and Management (50%)**

- Lead the team of Intake Specialists responsible for managing the inquiry process from potential clients; stewarding applicants through the eligibility and application process in a way that maximizes their chances of success
- Manage intake staff to deliver best-in-class client support (FreshChat, phone calls and email) to ensure that process and performance tracking are consistently being reviewed and amended for best practice
- Ensure all inquiries are properly and accurately responded to within WM's service response time frames
- Ensure consistency of messaging, assessment, and referrals to applicants
- Maintain an up to date referral database and resources that are available to Intake Specialists for referral of Clients out to suitable services according to the results of their needs assessment
- Monitor the risk profile of applications being assessed and recommend action steps in managing the portfolio
- Act as coach and mentor to the Intake Specialists staff

Data Collection (25%)

- Ensure complete and relevant data is collected at Intake to meet the needs of marketing & communications, and reporting purposes
- Design and implement processes for collecting and analysing information on client referral sources
- Work on any required data entry, processing, and analysis tasks
- Create and implement processes for collecting client success stories
- Evaluate processes for efficiency, and training the Intake team on software usage to improve productivity

Intra-Windmill Collaboration (25%)

- Work with fellow Managers to ensure that the transition from application to loan management is seamless and key learnings between departments are shared.
 - Manager, Key Partnerships to ensure key learnings that will increase the quantity and quality of new clients are shared; including analysis of relevant intake trends
 - Manager, Client Success to ensure that clients who are put through the intake process and move into Client Success, meet Windmill's basic eligibility criteria and are suitable for the next stage of the application
 - Manager, Loan Portfolio in recommending, developing and implementing continuous process improvement initiatives, including the use of technology in enhancing Windmill's processes and capabilities
- Regularly review Windmill Loan Policies and work with National Director, Client Success and National Director, Finance & Risk in recommending modifications to the CEO and Loan Committee, ensuring its relevancy with the changing environment for immigrants
- Develop, oversee and report on Intake and Data Collection metrics, service levels and compliance to Director, Client Success and identify issues that need to be addressed and resolved

- Work closely with MarComms team to incorporate client issues and feedback on website, marketing materials and outreach
- Ensure that the required participation of the Intake Specialists team in special projects is met

Direct Reports

- Intake Specialists

What success in this role looks like:

1. Maintain an Inquiry turn-around of maximum one (1) business day
2. Client Satisfaction ratings are consistently above 90%
3. Ensure that all data collected is appropriately informing annual Loan Policy reviews
4. Intake and Data Collection team activities are within budget at the end of every quarter

Qualifications and Knowledge:

- Minimum of one (1) year experience supervising staff and managing or building a program
- Knowledge and experience in Data Collection, Data Management and Data Analysis
- Strong Customer Service Experience
- Experience with Sisense or other Business Intelligence software
- Experience with FreshWorks suite of products
- Experience working in a community-based, not-for-profit organization, preferably serving immigrants
- Intermediate to advanced MS Office skills (Word, Excel, PowerPoint, SharePoint and Outlook)
- Knowledge of various CRM software

Competencies and Characteristics:

- Superior verbal and written communication skills; superior organizational skills and attention to detail; bilingualism an asset
- Strength in human resources areas of performance management, team leadership and staff coaching/mentoring, preferably in a diverse setting
- Ability to prioritize and appropriately identify and respond to urgent situations while meeting competing deadlines
- Ability to embrace and adapt to the use of new technology while supporting others in their learning.
- Ability to manage and build community in a national team environment, participating as a collaborative, professional and supportive member of Windmill
- Has a proven ability to achieve results and meet deadlines; has strong organizational and problem solving skills; has a high-energy, self-motivated approach and entrepreneurial attitude

Working Environment:

- Workstation in either Calgary or Toronto office

Salary:

- Commensurate with experience. Windmill offers an attractive compensation package.

If you meet the criteria above and are interested in applying for the position, please send your resume to hr@teamwindmill.org (reference: Manager, Intake and Data Collection). We are actively recruiting for this position, so to ensure you are given due consideration for this opportunity, interested



**Manager, Intake and Data Collection
Calgary or Toronto Office**

candidates should send their resume, including a cover letter and salary expectation, as soon as possible. The successful candidate will be required to provide a Police Clearance Certificate. We thank all applicants for their interest; however, only those considered for an interview will be contacted directly. No phone calls, please.