



## Homeowner Case Manager

April 2024

Capital Access, Inc. welcomes qualified housing case management professionals to apply for the Homeowner Case Manager position to support our growing Home Improvement and Energy Retrofit business in the Delaware Valley of Southeastern Pennsylvania.

Established in 1995 and based in Philadelphia, Capital Access integrates policy, project, compliance, construction, and financial management to improve the quality and affordability of housing and economic opportunity for lower-income communities. We provide comprehensive Home Improvement and Energy Retrofit solutions for lower income and energy burdened communities. Please see [www.capitalaccessinc.com](http://www.capitalaccessinc.com) for more details.

The ideal candidate embraces our core values to be:

- Proactive
- Discerning
- Integrity-Driven
- Collaborative
- Innovative
- Kind
- Accountable

Capital Access provides production and construction management services for two countywide home repair and energy retrofit programs in Southeastern Pennsylvania that will serve 500 low-income homeowners over the next two years. Both programs deploy public subsidies to address home Habitability, Accessibility and Energy Efficiency needs. We use our Capital Access, Project, Grants and Expenditure Management System (CAPGEMS) platform to manage coordination, communication and collaboration among homeowners, contractors, managers, and funders.

### Job Responsibilities

The Homeowner Case Manager serves as the trusted primary point of contact, coordination, and clarification for homeowner households throughout the life cycle of the program. The Case Manager manages all aspects of case management, communications, and coordination, including preparation of notes and entries needed in our CAPGEMS system.

- Support outreach and marketing to cultivate qualified homeowner applicants.
- Ensure Homeowners submit all necessary documentation, coordinate inspections and meetings with staff, and other necessary items to help meet eligibility requirements.
- Help homeowners submit complete applications in a professional and respectful manner. This includes technical assistance via web meetings and/or in person to help clarify application information and upload required documents into CAPGEMS.
- Conduct eligibility reviews of homeowners and houses based on program criteria.
- Help homeowners understand and sign off to comply with program rules, code of conduct, program participation, funding, and construction agreements.
- Ensure all applicant data, documents, and approvals in CAPGEMS are up to date.
- Assist with coordination of building permit applications, data entry, scheduling of in-person meetings & inspections, video inspections, and other related construction tasks.
- Serve as flexible and on-call expediter as needed to move projects forward.

Helping communities thrive.

220 Locust Street, Suite 16-C | Philadelphia, Pennsylvania 19106 | tel 215.551.2000 | [www.capitalaccessinc.com](http://www.capitalaccessinc.com)

### Skills and Experience Required

- Minimum 2 Years of experience in case management and/or housing services.
- Apply a deep level of kindness, clarity, professionalism, and persistence to build trust, cooperation and accountability that will help homeowners follow program rules.
- Ability to anticipate upcoming needs and potential problems, approach them with a positive problem-solving mindset, and communicate them to supervisor.
- Ability to communicate clearly, verbally and in writing, to de-mystify the home improvement process for homeowners and members of their household.
- Takes joy in the art and science of organization and ability to work down a compliance checklist and follow specified analytical tasks to determine homeowner eligibility.
- Keen eye to identify discrepancies in data and/or communications that require management review and guidance.
- Proficient and curious tinkerer to master efficiency tools of Microsoft Office and related software for communications, coordination, data entry, and document management.
- Fluency in Spanish is most welcomed.

### Employment Terms

- This is an Exempt, At-Will professional full-time employee position.
- This position is a hybrid of frequent work on-site for case management within the Delaware Valley of SE PA and remote for administrative work.
- Compensation is set to align with experience and expertise with performance bonuses.

Capital Access welcomes candidates with the above qualifications, skills, and experience to apply. Bilingual candidates are encouraged to submit qualifications. Please email resume, two references, and letter of interest to [recruitment@capitalaccessinc.com](mailto:recruitment@capitalaccessinc.com).

All duties and responsibilities listed are essential job functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or logical assignment to the position. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, sexual orientation, age, disability, protected veteran status, or any other characteristic protected by law.

Hiring is contingent upon satisfactory results of employment and background verification. This job description does not constitute an employment agreement between employer and employee and is subject to change by the employer as the needs of the business and requirement of the job change. Capital Access reserves the option to request more information as needed.

Capital Access is an Equal Opportunity Employer. Candidates will be considered regardless of race, color, religion, sex, national origin, age, sexual orientation, protected genetic information, status as a parent, lawful political affiliation, marital status, physical/mental disability (beyond what is required for successful job performance), membership or non-membership in an employee organization, or any other non-merit factor.

**Thank you for your interest in Capital Access!**

