**A logo for a community lending company

AI-generated content may be incorrect.**

**POSITION:**

**SMALL BUSINESS LENDING**

**SMALL BUSINESS TECHNICAL ASSISTANCE & TRAINING OFFICER**

Local Community Development Financial Institution is seeking a Small Business Technical Assistance & Training Officer to be responsible for providing primary business coaching and advice to potential Small Business loan applicants and existing Small Business borrowers. This position reports directly to the Director of Small Business Lending and works collaboratively with Small Business Loan Officers, the TA Associate, and the Small Business Loan Associate. This is a position with the potential to grow as the CDFI is looking to expand its offerings in the future to include a Business Resource Center. The Employer is a certified Community Development Financial Institution §501(c)(3) nonprofit corporation.

**JOB SUMMARY:**

This position provides business coaching and development support to small business loan applicants and borrowers. The primary functions are to (1) work with potential borrowers to assist them in completing a business plan, preparing and understanding business financials, and otherwise help them prepare to apply for a Small Business loan, (2) work with Small Business borrowers on a regular basis to review and update their plans and financials, head off issues before they become problems, and otherwise strengthen their small businesses, and (3) support the implementation and development of the organization’s Small Business Training & Development Program.

***The TA and Small Business Training Offic*er** possesses a drive to assist existing and potential entrepreneurs in their efforts to access capital to achieve financial success and improve the overall economy of Baltimore and surrounding counties is a key requirement, as well as the ability to identify each existing or potential business owner’s level of understanding of small business planning and financial management and to work with a variety of entrepreneurs at various levels of skill, experience, and knowledge – including entrepreneurs with ***little to*** ***no*** **business** skill, experience, or knowledge whatsoever – is also key. This position requires a significant amount of customer contact, data collection and recordkeeping.

# DUTIES AND RESPONSIBILITIES:

* Continuous support to build out, grow, and develop a robust Small Business Training and Development Program.
* Assist and advise small business loan applicants and potential applicants in the (1) development and/or review of a comprehensive a business plan that meets lending requirements; (2) preparation and analysis of small business financials; (3) understanding of the legal requirements for starting or operating a business in Maryland; and the (4) basic understanding of small business financing, including financial planning, loan progression, typical credit criteria for small businesses, and personal vs. business credit matters.
* Meet any other training requirements established as amended from time to time.
* Maintain a Schedule of Contacts and facilitate ongoing communication with existing Small Business borrowers to review their updated business plans and financials, address any problems or concerns, and update their impact data for the organization’s records.
* Interact directly with Small Business Loan Officers and the Small Business Loan Associate in the course of supporting small business loan applicants, potential applicants, and existing small business borrowers, keeping the Loan Officers, Loan & Marketing Associate, and the Director of Small Business Lending well informed of the status of each entrepreneur’s progress.
* Manage the expeditious flow of data between the small business loan applicants and the Small Business Loan Officers, especially in the preparation of small business loan applications.
* Maintain detailed reports of small business loan applicants’ and potential applicants’ stages of development and progress through the program, as well as impact, growth and financial data for applicants, potential applicants, and existing borrowers for presentations at regularly scheduled pipeline meetings, Small Business Advisory Board meetings, and Board of Directors meetings.
* Manage and complete all program reporting requirements of loan tracking software and system.
* Continue to refine the Small Business Training and Development Program and assist in finding ways to streamline the training process through automation and other methods.
* Help coordinate, develop, and host Small Business Training and Development seminars online and in-person (as appropriate) on various subjects of interest to potential and existing entrepreneurs, inviting relevant guest speakers and panelists when appropriate.
* Coordinate, develop, and implement special projects as assigned by the Director of Small Business Lending, including, but not limited to, assisting in the preparation of grant applications and other capital raising proposals to support the Small Business Training and Development Program.
* Demonstrate proficiency in effectively communicating technical concepts, writing letters, memoranda, business summaries, position papers.
* Work as a team member, ever conscious of deadline needs, workflow, and assignment schedules.
* Performs other duties as assigned.

# POSITION QUALIFICATIONS:

* At least five (5) years’ small business training experience or commercial/business banking experience dealing with small to medium-sized businesses with an emphasis on business lending.
* Experience writing, developing, and/or reviewing Business Plans.
* Demonstrated leadership, organizational and interpersonal skills to direct, develop, and implement programming and engage existing and potential entrepreneurs.
* Strong customer service skills and the ability to establish rapport with people of diverse ethnic, racial, and cultural backgrounds.
* Excellent organizational skills, with attention to detail and the ability to work independently.
* Effective time management and interpersonal skills.
* Excellent verbal and written communication skills.
* Proficiency with basic computer skills including Microsoft Excel, Outlook, Word, and Power Point.
* Experience with Salesforce a plus.
* Familiarity with Baltimore City and its neighborhoods a plus.
* Bachelor’s degree a plus. Extensive experience may be substituted for educational experience.

**COMPENSATION:**

Compensation may range from $62,000-$67,000/annually, paid as a salary with benefits, commensurate with experience and qualifications. An excellent benefits package includes a 40lk plan with match, health insurance, life, and disability insurance, and paid annual leave.

To Apply Send Your Resume to: [Info@kellerproservices.com](mailto:Info@kellerproservices.com)

**Equal Opportunity Employers (EOE).**

# **501(c)(3) Non-Profit Certified Community Development Financial Institution**