

Job Title: Business Services Manager
Department: Impact
Reports To: VP of Impact
FLSA Status: Exempt
Grade: 12E
Job Code: 05803

New: 2/1/2024

SUPERVISORY RESPONSIBILITIES

Supervises assigned business services staff, interns, and volunteers.

SUMMARY

The Business Services Manager is responsible for the development, implementation, and management of training and technical assistance and/or business development services to existing and prospective borrowers of Access Plus Capital, to minimize risks to its portfolio. This involves pre- and post-loan training and technical assistance to entrepreneurs in one-on-one or group settings, as appropriate.

Access Plus Capital is a US Treasury-certified community development financial institution and Small Business Administration (SBA) Approved Microloan Intermediary Lender. It offers financing and training services to small businesses and entrepreneurs in central California. Since its inception in 2009, it has lent over \$40 million to over 850+ entrepreneurs helping them realize their dreams by starting and growing their small businesses. For more information, go to <http://accesspluscapital.com>.

DUTIES AND RESPONSIBILITIES/ESSENTIAL FUNCTIONS

Responsible for supervising assigned staff, interns and volunteers; recruitment, performance management and other personnel processes.

Assure a safe, proactive, organized, respectful, and instructive work/service environment.

Work closely with the Business Development team and the VP of Lending to ensure clients receive one-on-one coaching and are loan-ready.

Ability to review and critique business plans, projections, and start-up budgets.

Develop, coordinate, market/promote, and facilitate periodic pre- and post-loan training, Technical Assistance Workshops, and Entrepreneur Cohorts which include curriculum for financial, credit, and business start-up and growth education modules in communities throughout Access Plus Capital’s service area.

Provide program orientation to new onboarding Business Services providers.

Responsible for maintaining and fostering relationships with business service providers and contracted consultants within the communities supported by Access Plus Capital.

Facilitates invoicing and contract management for Business Services providers.

Provides data and input for mandated grant reporting.

Access Plus Capital Job Description

Business Services Manager (05803), Impact

Fully support Access Plus Capital's mission to "eliminate economic barriers to financial success".

Maintain a current understanding of all relevant (Internal, State, Federal, etc.) policies and procedures, including regulatory compliance guidelines.

Responsible for obtaining and analyzing credit reports for companies and individuals to assist in the analysis process.

Travels for agency business using reliable transportation.

Works evenings and weekends as required.

Performs other duties as assigned.

QUALIFICATIONS

To execute this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION:

Bachelor's Degree in Business Administration, Finance, Accounting, Economics, or related field required. Additional work experience may substitute required education on a year-by-year basis.

EXPERIENCE:

Minimum of three (3) years of related experience in working with small businesses providing one-on-one, classroom, and group training required.

Minimum of three (3) years of relevant experience in the finance/banking sector preferred.

OTHER QUALIFICATIONS:

Knowledge of business financial statements including income and cash flow and the ability to assist clients with the development and review of such statements.

Understanding of personal and business credit including evaluating credit reports.

Strong problem-solving skills.

Strong interpersonal skills and customer service.

Ability to work on multiple projects simultaneously, managing time and resources to ensure work is completed efficiently and within established timeframes.

Excellent customer contact and follow-up skills.

Ability to establish and maintain effective working relationships and contacts with professional and business organizations and develop teamwork with co-workers on related units.

A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature.

Proficient in Microsoft Office Suite and related business software. Ability to learn new database systems.

Access Plus Capital Job Description

Business Services Manager (05803), Impact

Effective presentation, written and verbal communication skills.

Willing to work non-traditional hours and days to meet the needs of this position.

Maintain a valid California driver’s license, reliable transportation, adequate auto insurance as required by State law, and insurability by Access Plus Capital carrier for those driving personal vehicles on behalf of the organization.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands and fingers to handle or feel; and talk or hear. The employee frequently is required to stand, walk, and reach with hands and arms. The employee is occasionally required to stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds, and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to outside weather conditions. The noise level in the work environment is usually moderate.

Note: *The statements herein are intended to describe the general nature and level of work being performed, but are not to be seen as a complete list of responsibilities, duties, and skills required. Also, they do not establish a contract for employment and are subject to change at the discretion of Access Plus Capital.*

Human Resources Approval: Date:	Supervisor Approval: Date:
VP Approval: <i>Cherella Nicholson</i> Date: 2/1/2024	President Approval: Date: