

## **SOUTHWESTERN COMMUNITY COLLEGE DISTRICT**

**CLASS TITLE: PROJECT SENIOR FINANCE ADVISOR-SMALL BUSINESS DEVELOPMENT CENTER (SBDC)**

**RANGE: 44**

### **DISTRICT VALUES**

Incumbents in District positions are expected to exhibit an equity-minded focus, responsiveness, and sensitivity to and understanding of the diverse academic, socioeconomic, cultural, gender identity, sexual orientation, and ethnic backgrounds of community college students, and employees, including those with physical or learning disabilities, and successfully foster and support an inclusive educational and employment environment.

### **SUMMARY DESCRIPTION**

Under the general direction of the responsible administrator, develop, conduct, and promote a wide variety of technical assistance, services, and activities in accordance with program goals and objectives and local economic development efforts that require an extensive knowledge of the methods and procedures used in small business lending; analyze the needs of small businesses, prescribe a scope of work and plan of action to address those needs, and implement the scope of work and plan of action by consulting with small business owners and/or program staff providing assistance related to small business lending; perform a variety of specialized professional tasks in support of assigned area of responsibility.

### **DISTINGUISHING CHARACTERISTICS**

This is the advanced journey level class in the Project Business Advisor series. Positions at the Senior level are distinguished from the Project Business Advisor by the level of responsibility assumed and the complexity of duties assigned. Employees perform the most difficult and responsible types of duties assigned to classes within this series including responsibilities that require an extensive knowledge of the methods and procedures used in small business lending.

### **REPRESENTATIVE DUTIES**

*The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.*

1. Independently consult with potential and existing business owners; assess and analyze business needs; assist in researching, planning, and problem solving the full range of issues related to acquiring financing; provide expertise and assistance in understanding lending markets and related finance programs and policies; assist small businesses with capital assistance needs. **E**
2. Establish and coordinate formal agreements delineating specific services and roles between the SBDC, public and private entities, and private individuals. **E**
3. Perform project management activities such as estimating, scheduling, tracking, and adjusting resource utilization to ensure timely, accurate implementation of services and programs. **E**
4. Maintain activities and performance to comply with funding contracts and program objectives. **E**
5. Accomplish technical assistance milestone objectives and maintain client progress portfolio according to established policy and procedures. **E**
6. Serve as a liaison between the assigned program and internal and external stakeholders; maintain positive and productive relationships with organizations, businesses, individual partners, and others contacted in performing assigned functions. **E**

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7. Participate in the identification of needs for new or improved training programs and provide a lead role in the implementation of such programs; design and deliver training courses related to business topics including government capital programs, small business lending, loan packaging, business financial records, cash flow management and projections, and other related issues. **E**
8. Conduct in-depth research and provide technical support to program staff; serve as a mentor on complex business topics; perform a lead role in analyzing client needs and assessing the effectiveness of client action plans; provide technical feedback to program staff. **E**
9. Conduct market research; develop marketing strategies/tactics related to government customers. **E**
10. Develop strategies to acquire small business clients that includes using traditional and web-based communications tools such as social media and email marketing campaigns; lead, coordinate, and conduct outreach activities that includes developing partnerships with public agencies, prime contractors, industry/business associations, and other organizations. **E**
11. Develop survey instruments to evaluate program effectiveness; conduct surveys of program participants to determine participant needs; interpret and record survey results; implement program changes in response to results. **E**
12. Recommend and assist in the implementation of program goals and objectives; establish schedules and methods for providing technical assistance services; implement policies and procedures. **E**
13. In collaboration with management, evaluate and provide recommendations to strengthen client management system to effectively meet program goals; prepare detailed reports as needed. **E**
14. Oversee the work of hourly employees; assist in coordinating the effective use of outside consultants. **E**
15. Perform related duties and responsibilities as required.

**KNOWLEDGE AND ABILITIES**

**Knowledge of:**

- Operations, services, and activities of a small business lending assistance program including funding alternatives.
- Extensive knowledge of the methods and procedures used by lenders with underwriting and loan processing.
- Accounting systems and business financial reporting.
- Governmental programs that support small business lending, including federal and state loan guarantees.
- Principles and practices of program development and implementation.
- Methodologies of problem identification and problem solving. Principles and practices of adult learning and instruction.
- Use of online education tools.
- Methods and techniques of public speaking and presentation styles. Principles of effective supervision.
- Principles and procedures of record keeping and report preparation.
- Modern office procedures, methods, and equipment including computers and related software. English usage spelling, grammar, and punctuation.
- Interpersonal skills using tact, patience, and courtesy. Pertinent Federal, State, and local laws, codes, and regulations.

**Ability to:**

- Independently coordinate and direct business assistance programs including those requiring an extensive knowledge of the methods and procedures used in small business lending.
- Provide effective leadership within assigned area.
- Read, interpret, apply, and explain applicable complex laws, regulations, requirements, policies, and procedures.
- Recommend and implement goals and objectives for providing business assistance services. Investigate, research, analyze, and evaluate complex business problems.
- Use technical knowledge to draft and propose effective solutions.
- Effectively communicate alternative solutions at the technical, user, and administrative levels.
- Provide a wide variety of specialized advice, guidance, technical assistance, and direction to businesses on a full range of Federal, State, and local government small business lending laws, policies and procedures including requirements and procedures used by the State of California, US Small Business Administration, and other Federal agencies for loan guarantees.
- Effectively teach business financial management principles and strategies to adults in a group setting.
- Create, analyze, and modify business financial records to meet client needs.
- Estimate, schedule, track, and adjust projects to effect timely completion of projects.
- Compile information and compose reports, business correspondence, and procedural manuals.
- Ensure business compliance with laws, codes, and regulations as they apply to small business lending. Provide applicable and helpful information regarding small business lending.
- Work independently with limited supervision.
- Use sound judgment in recognizing scope of authority. Prioritize work to meet schedules and timelines.
- Operate and use modern office equipment including a computer and applicable software applications.
- Adapt to changing technologies and learn functionality of new equipment and systems.
- Work with and exhibit sensitivity to and understanding of the diverse racial, ethnic, disabled, sexual orientation, and cultural populations of community college students.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**EDUCATION AND EXPERIENCE**

*Any combination of training and experience which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Any combination equivalent to: a bachelor's degree from an accredited college or university with major course work in business administration, business finance, public administration, or a related field **AND** seven (7) years of increasingly responsible small business finance related experience that includes experience providing technical assistance.

A master's degree is preferred.

**LICENSE OR CERTIFICATE**

Valid California driver's license and a safe driving record. Must qualify for insurability by the District's insurance carrier.

**PHYSICAL DEMANDS AND WORKING ENVIRONMENT**

*The conditions herein 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 job functions.*

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**Environment:** Work is performed primarily in a standard office setting with frequent interruptions and distractions; extended periods of time viewing computer monitor; extensive public contact; possible exposure to dissatisfied individuals; frequent travel to meetings and events is required.

**Physical:** Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

**Vision:** See in the normal visual range with or without correction.

**Hearing:** Hear in the normal audio range with or without correction.

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*Human Resources*