



Position Announcement | **Small Business Advisor**

Position type: Full-time; Oakland, CA

Start date: Late-January 2014

Salary: Commensurate with experience; excellent benefits

ORGANIZATION DESCRIPTION

For nearly 35 years, OBDC Small Business Finance has been committed to creating economic opportunity in the Bay Area by serving and supporting small business communities through:

- Providing a diverse portfolio of term loan products and technical assistance to small businesses unable to obtain financing from banks
- Increasing job opportunities for low-to-moderate income residents
- Supporting wealth creation through entrepreneurship and business ownership
- Promoting redevelopment and economic development in low-income communities in partnership with government agencies

POSITION DESCRIPTION

The Small Business Advisor will provide no-cost business advising to OBDC's current and prospective clients. Advisement will primarily cover preparation and due diligence of financial projections. Advisement will also cover a comprehensive range of small business subject areas, including but not limited to: business planning, business documentation, financing options, bookkeeping, marketing, pricing, scaling, and operations. The Advisor will work with clients with a wide-range of business experience and sophistication, whose businesses are in various industries and stages of growth.

Successful candidates must be highly experienced in small businesses, collaborative by nature, and possess emotional intelligence and empathy. This position involves daily interaction with borrowers from diverse backgrounds and requires a personable and patient nature.

Duties include:

- Hold one-to-one advisement sessions to help prospective clients become loan-ready and to help advise current clients with business management
 - Counseling and training topics significantly focused on financial projections, but also include developing business plans, financing, permits and licensing, bookkeeping, marketing, management, operations and other areas of small business ownership
 - Develop a confidential relationship between client and advisor
- Actively monitor and respond to advising inquiries on OBDC's online client forums
- Develop and conduct business training programs and workshops that are responsive to the needs of OBDC's clients
- Facilitate client roundtable discussions and subject expert panels
- Assist with OBDC's programmatic events and activities
- Refer clients to other appropriate sources of small business information and assistance

- Disseminate best business practices to OBDC's clients via various media
- Stay updated of happenings affecting the business community to share with clients
- Serve as an advocate and leader for business development and retention in the local business community

QUALIFICATIONS

- Bachelor's degree, preferably in finance, accounting, economics, or business
- 10+ years' experience in small business development and management
- Extensive experience preparing and conducting due diligence of financial projections for lenders
- Extensive experience with preparing business plans for lenders; marketing plans; small business operations; financial management; process to start a business, including permit and licensing
- Excellent verbal/written communication and relationship-building skills
- Attention to detail
- Strong time management skills
- Excellent presentation and pedagogical skills
- Self-starter who can work with minimal supervision and be comfortable in an evolving nonprofit environment
- Ability to work with diverse personalities and backgrounds
- Comfortable meeting client's immediate needs in a fast-paced setting
- Software proficiency including Microsoft Word, PowerPoint, Excel, and Salesforce
- English/Spanish bilingual strongly preferred
- Commitment to helping small businesses succeed and has a passion for the mission of OBDC

How to Apply:

Please email resume and cover letter to Jen Leybovich, Director of Programs and Strategy, at jen@obdc.com. Please also indicate the industries in which you have working experience and the business skills which you could provide expertise.

OBDC provides excellent benefits for full-time employees including: health, dental, and vision insurance, paid time off and holidays. OBDC is an equal opportunity employer.