

Finance Fund

<b>Statement of Competencies</b> Program Loan Officer	<b>EXEMPT:</b>  <b>NON-EXEMPT:</b>	<input checked="" type="checkbox"/>  <input type="checkbox"/>	<b>DIVISION:</b> Program Team
<b>Location:</b> Columbus, Ohio  <b>Reports to:</b> Chief Program Officer	<b>PART-TIME:</b>  <b>FULL-TIME:</b>	<input type="checkbox"/>  <input checked="" type="checkbox"/>	<b>REVISION DATE:</b>  10/3/11
<b>Function:</b> Facilitate the implementation of corporate programs. Requires client servicing, policy implementation, and program related technical assistance.			
<b>Education and/or Experience:</b> Possess a Bachelor's degree in business or related field with a minimum of 5 years pertinent experience in banking, finance, and/or community development.			
<b>Core Competencies:</b> <ol style="list-style-type: none"> <li>1. Effective communication and interpersonal skills.</li> <li>2. Be self-motivating and exhibit positive time management skills.</li> <li>3. Exhibit an attitude conducive to positive relationships with staff, clients, and all individuals/businesses communicating with the corporation.</li> <li>4. Ability to work independently with limited supervision.</li> <li>5. Be willing to ask clarifying questions, or request revisions to tasking.</li> <li>6. Able to react to change positively and remain productive.</li> </ol>			
<b>Position Competencies:</b> <ol style="list-style-type: none"> <li>1. Training and/or experience interpreting lending and community development policies and procedures for the purpose of implementation.</li> <li>2. Training and/or experience interfacing with clients, groups, partners, and the public.</li> <li>3. Training and/or experience interviewing, analyzing, recommending response to specific internal or external formal requests.</li> <li>4. Capability to organize and manage multiple tasks.</li> </ol>			
<b>Job Competencies:</b> <ol style="list-style-type: none"> <li>1. Knowledge and experience in the economics of community development, early childhood and human service programs, finance, financial packaging, real estate development, underwriting or related fields.</li> <li>2. Knowledge of techniques in relationship building and negotiations.</li> <li>3. Able to take direction, be open and receptive to learning, and work cooperatively with others.</li> <li>4. Have basic knowledge in financial software (e.g., Moody's, excel).</li> </ol>			
<b>Duties:</b> <ol style="list-style-type: none"> <li>1. Client Services:                         <ol style="list-style-type: none"> <li>a. Serve as the primary project contact with clients, banks, and other institutional partners.</li> <li>b. Provide direct technical assistance to clients (i.e., applications, on-site consultation, expertise liaison, program information).</li> <li>c. Represent the Corporation in direct programmatic dealings with client organizations.</li> </ol> </li> <li>2. Project Management:                         <ol style="list-style-type: none"> <li>a. Facilitate client application process.</li> <li>b. Document project activity (i.e., update tracking system, document project contact, update portfolio).</li> <li>c. Submit applications to underwriting for review.</li> <li>d. Present project applications with underwriting recommendations to review committees.</li> </ol> </li> <li>3. Outreach:                         <ol style="list-style-type: none"> <li>a. Provide product related training to client groups.</li> <li>b. Make presentations to community organizations.</li> <li>c. Attend meetings and public events which provide marketing opportunity.</li> <li>d. Collaborate with staff in the development, implementation, and maintenance of the marketing strategy.</li> <li>e. Connect with clients and community groups in pursuit of viable projects.</li> </ol> </li> </ol>			

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4. Perform additional tasks as assigned.
5. Serve as a member of the Program Team, and other Ad Hoc work groups as necessary

**The above statements describe the general nature and level of work being performed by individuals assigned to this classification. This is not intended to be an exhaustive list of all responsibilities and duties required of personnel so classified.**