



## **SMALL BUSINESS SERVICES ADVISOR**

Annual pay range: \$50,000 - \$60,000

### **Overview**

San Pablo Economic Development Corporation's (San Pablo EDC) is a dynamic nonprofit whose mission is to develop, diversify and stabilize the local economy through the education and training of our workforce and businesses. San Pablo EDC is a member-based, professional services organization, which partners widely with other organizations to serve businesses and workforce in Alameda and Contra Costa Counties.

The Small Business Services Advisor (Advisor) plays a key role in the establishment, stabilization and growth of small businesses. The Advisor is a consummate relationship builder possessing effective outreach and engagement skills. He/she excels in data and story capture to help San Pablo EDC best illustrate its impact. Central to coordination of technical assistance, access to capital and services small businesses most need, the Advisor assists with the underwriting of grant/loan applications, project management of initiatives and webinars, and general delivery of services to small businesses. The Advisor brings creativity, strong project management, people and communication skills, as well as a passion for social, racial, and economic justice.

To be successful, the Advisor needs to be effective in understanding and engaging the San Pablo and greater Contra Costa County business community. The ideal candidate is someone who has great listening skills and excels at taking thoughtful notes; displays an entrepreneur-centric phone presence and email etiquette; demonstrates responsible time management skills; and has direct or lived experience on small business fundamentals and familiarity with business terminology. The successful candidate is deeply invested in the success and resilience of our most under-invested small business owners, and helping them be the local change makers in their communities that build wealth through quality job creation that allows for employee agency.

The Advisor is a full-time exempt, benefited position reporting to the Senior Business & Assets Coordinator with a generous benefits package. The Advisor has a critical role to fulfill as part of a productive, adaptable team that is continuously creating and improving programs, services and protocols to be most responsive in an ever-evolving environment.

### **Responsibilities**

The Advisor will be responsible for the following.

#### **Business Services**

- Gather, curate and make available in a timely manner all content, messages and images for eblasts, flyer creation and social media posts, and work with the Senior Coordinator to ensure engaging accurate content is prepared for the PR & social media firm for business services, including events, campaigns, initiatives and technical assistance/biz education events/webinars
- Lead engagement of local small businesses in business services

- Assist with the creation of marketing collaterals and outreach for all services and major campaigns, e.g., Restaurant Week, Where's Pablo?, Small Business of the Year and Build Back Stronger/CREATE
- Support coordination of multi-agency technical assistance (TA) on behalf of business members and the Senior Coordinator
- Assist business clients with basic marketing services TA, including promotion via Instagram stories, Eblast spotlights, mini-videos, getting established on Google Places, taking control of social media, and design of ad share direct mailer.
- Keep business-related website content, including the calendar, up to date, with links to small business social media or websites
- Assist the Senior Business & Assets Coordinator by identifying ways to further engage program participants while improving participant's experience quality, user retention, and satisfaction rates, and seek input from business members to identify greatest value sought and create programs that help deliver desired value
- Create social media toolkits, collaterals, and other digital assets outline resources for prospective clients, partners and funders to better understand EDC offerings
- Assist with the creation of content for San Pablo EDC-City of San Pablo collaborative ***El Portal*** quarterly newsletter
- Ensure all activities – emails, phone calls, meetings, service delivery, participation in programs, etc. – are captured in the Salesforce database; produce Salesforce data reports upon request
- Support the building of strong relationships between the business community, EDC, and partners
- Create fillable forms and manage changes to existing forms
- Work in tandem with the Controller and Senior Business Coordinator to issue invoices, receive payments and reconcile accounts for business services
- Assist the Senior Business & Assets Coordinator for all potential borrowers and referring partner organizations. This may include application review, assistance or referral to TA for businesses, verification of application completeness, and preliminary underwriting/analysis
- Assist with the due diligence of items from potential borrowers, run credit checks, and assist with ratio and financial analysis in the underwriting process
- Participate with borrower compliance with financial, reporting, and advising covenants, monitor borrower financial performance, and assist with analysis of potential borrowers
- Actively update lending applications
- Maintain electronic and hard copy files in audit-ready condition for all borrowers
- Help maintain reporting, risk rating analysis and other portfolio records as needed
- Help the EDC capture small business data and stories
- Grow industry and sector knowledge by attending events and developing strong working relationships with clients and partners

## **Requirements**

### **Skills**

- Highly proficient in MS Office Suite, especially Excel, online POS systems (e.g., Square) and social media (Facebook, Twitter, LinkedIn, IG) with a strong aptitude for learning new software programs quickly
- Salesforce or other CRM competency required
- Adobe Creative Suite proficiency required
- Bilingual Spanish/English strongly preferred
- Strong communication skills both written and verbal
- Proficient at data and story capture, and basic analysis
- Proficient with logistics and basic project management
- Marketing and/or public outreach skills required; fund development a plus
- Proficient in creating presentations, fillable forms and marketing materials
- Ability to conduct basic research and analysis with graphic production
- Ability to update web content, as needed, and maintain event calendars

### **Experience**

- Has experience with managing and reviewing application processes, ensuring requirements are met, and if not, assisting clients with meeting those requirements
- Has some experience with underwriting or risk management; experience assessing qualifications for program eligibility is applicable
- Has organized, scheduled and supported webinars, public events and other programs
- Has basic marketing experience on multiple platform, including collateral creation and outreach
- Experience managing a program, events or projects is required
- Basic financial and/or data-related experience is preferred

### **Education and Certifications**

- An Associate's Degree and two years of directly related experience in an economic development, business attraction and/or health equity, social, racial and/or economic justice field is required.
- Bachelor's Degree from an accredited college or university with major course work in urban planning, economic development, public or business administration, finance, or health equity, social, racial and/or economic justice with relevant work experience preferred.
- Membership and participation in related professional organizations are desirable.
- Certification or experience with Adobe Creative Suite, Salesforce, GIS, and/or economic development preferred.

## **Basic Requirements**

- California Driver's License
- Right to work in the United States of America

## **Attributes**

- Has a professional presentation and engaging presence
- Listens well and practices curiosity
- Has a strong work ethic and values quality
- Is engaging, positive and brings a solutions-oriented attitude
- Is community-minded and vested in social, racial and economic justice
- Possesses a natural service orientation
- Has an aptitude to learn and is comfortable learning on-the-job and continuously evolving programs and protocols to be more responsive to clients and efficient
- Is attentive to details
- Demonstrates creative problem-solving and a collaborative nature
- Manages competing priorities and dynamic work flow effectively
- Self-starter willing to take initiative and ask questions; let's their manager know what they don't know

## **Pay Range Qualification**

Beginning of range: \$50,000

- New to this level of responsibility
- Possesses translatable skills versus direct experience
- There are areas of responsibility for which training will be necessary and candidate has no or limited prior experience
- New to economic development
- Has sufficient software, project management, outreach and/or operational experience to provide support

Mid-point: \$55,000

- Has held this level of responsibility for at least a year
- Has sufficient experience in all areas of responsibility; may require some training to achieve advanced levels of competencies
- Has sufficient sales and member/customer service experience
- Has two years of leading projects with successful track record from concept through execution with ability to manage to milestones
- Has lending experience, i.e., basic underwriting and application assistance
- Demonstrates ability to deliver timely results
- Demonstrates appropriate use of resources
- Manages complex workflow effectively
- Displays consummate professionalism
- Sets, effectively communicates and meets expectations

High end: \$60,000

- Has held this level of responsibility two years or more
- Has depth of demonstrated experience in all areas of responsibility, including events, sales and lending
- Demonstrates understanding of strategic framework which informs operations design and delivery
- Operates continuously with mission and strategic plan as lens and filter, respectively
- Has three years or more of leading projects with successful track record from concept through execution with ability to manage to milestones
- Demonstrates ability to build productive, efficient teams
- Demonstrates a wide scope of skills and comfort stepping into roles as requested
- Is an effective asset manager and administrator of third-party contracts necessary to program responsibilities and organization operations
- Track record delivering timely results
- Has earned the trust of local businesses and colleagues inside and outside the organization
- Demonstrates excellent judgement