

CFDCCO Business Advisor Position Expressions of Interest

Community Futures Development Corporation of Central Okanagan (CFDCCO) is seeking a dynamic Business Advisor. This position may be a self employed contractor if the applicant is eligible, qualified and demonstrates proficiency in specialized areas of responsibility and has an active business practice that would complement and not conflict with this position. The position may also be structured as an employment position. Earnings potential will commensurate with level of experience, competency and time availability. The minimum amount of time commitment expected for the position will be 85 hours/month or approximately 3 days/week.

The following general areas of responsibility for the CFDCCO Business Advisor are:

Business support services:

Provide entrepreneurial oriented business development advice and support to new and existing businesses:

- Provide up to date business information and counseling to all CFDCCO clients including one on one business plan development and business reviews as required
- Perform client needs assessments and interviews including introductions to other services and programs
- Assist with training program development
- Facilitate Assess Your Business Idea Workshops, Business Plan Development Program (BPDP) sessions and ½ day business development workshops

Loans analysis and portfolio management:

Assist with the management and growth of the \$3.2M business loan portfolio:

- Assist clients in the preparation of loan applications and supporting materials including their business plan, marketing plan, financial forecasts etc.
- Complete and present loan and credit analysis with summary and recommendations to Management and the Loan Committee
- Develop and assist with the development of Letters of Offer and other loan security requirements
- Assist with proper security registration and ongoing loan file maintenance as required
- Liaise with solicitors, accountants, insurance companies, financial institutions where required to conduct due diligence on client files
- Supervise and monitor loan clients
- Initiate, monitor and assist with collection of delinquent accounts
- Provide loan client aftercare and growth support where appropriate

Marketing and Promotion:

Ensure effective marketing of the business advisory services for loans and self employment programs:

- Assist, develop and participate in CFDCCO marketing plans, strategies, and work plans
- Assist, develop, facilitate updates of CFDCCO marketing and support materials as required including brochures, website information, information packages, promotional items
- Identify and diligently follow-up with key contacts, perform networking activities and make effective presentations

Applicant Qualifications and Competencies

The Business Advisor position is a key position at Community Futures that requires a business minded person who possesses a wide range of skills and experience. Our focus on hiring or contracting will be to identify a candidate who has a strong mix of education and/or experience along with an entrepreneurial attitude and aptitude that makes them an excellent business advisor, lender, business developer and advocate for Community Futures including:

Personal characteristics:

Hiring for this position will focus on individuals with the following demonstrated characteristics:

- Strong inter-personal and communications skills
- Ability to function well in a small team environment
- Ability to take direction and work with a volunteer based organization and lending committee
- Positive and opportunity focused
- Results oriented self-starter
- Confidence in making decisions and communicating decisions effectively to clients
- Ability to identify and act on key issues related to loan applications, loan files and business development

Education and Experience (at least two of the following attributes):

- Business diploma or degree
- Small business ownership
- Business analysis, counseling, coaching and business development experience
- Commercial lending
- Business training and facilitation experience

Computer Skills:

- Proficiency with Microsoft Excel and Word is required
- Competent computer user including strong organizing, file management and troubleshooting

Accountability:

- Work cooperatively with and be accountable to all CFDCCO staff, management, contractors and board members as required.
- Participate and facilitate planning, reporting and administrative functions related to the business advisory and loan programs in a timely and accurate manner
- Maintain, update and streamline processes, procedures and forms to optimize intake, assessment, counseling and decision making to ensure high quality client service
- Enter relevant client information and statistics into client management system on a timely basis
- Attend committee, staff and board meetings as required

Background Information Required:

- 1) Curriculum vitae and contact information
- 2) Specific areas of speciality, certification, interest and goals
- 3) Preferred timing and availability
- 4) Rates and earning expectations

All submissions should be sent in a Microsoft Word document format or pdf to:

Larry Widmer CMC, General Manager
email: lwidmer@cfdccco.bc.ca

This position will remain open until filled by a suitable candidate.