



JOB DESCRIPTION

Job Title: WWBC Client Intake Specialist **Reports to:** WWBC Director

Salary Grade: 7

FLSA Status: Exempt

Location: Asheville Office

Revised: May 2023

Who we are:

Carolina Small Business Development Fund (CSBDF) is a nonprofit and certified community development financial institution (CDFI). We are passionate and committed to providing support to small businesses across the state. Our Mission is to foster economic development in underserved communities by providing capital, business services, and policy research to support small businesses. CSBDF provides assistance to small business in four major ways: as a partner, as a trusted guide, as an advocate for small businesses, and as an accessible funding source. Our work supports our vision to create economic opportunity for all people.

Nature of Work:

The Client Intake Specialist at the Western Women's Business Center is a full-time position. This position provides initial contact with the public, conducts data entry, manages client files, and maintains an organized and efficient office environment. In addition, this position works closely with the WWBC Director to provide support, development and assistance with grant compliance and intake/assessment of incoming clientele.

Supervision Received/Exercised

An incumbent of this class is under the administrative direction of the WWBC Director. This incumbent is responsible for accomplishing department objectives, goals, KPIs and established guidelines established by the President/CEO and the Board and maintains a professional and supportive work environment.

Essential Job Functions:

- Conduct client's needs assessments to set 1:1 coaching session between clients and coaches and collect proper SBA required documentation from coaches.
- Provide lending and business resources and opportunities to clients including business advising/technical assistance, loan application packaging, professional referrals (i.e. - accountants, attorneys, insurance agents), group trainings/events, and online resources).
- Enter information from all intake applications, follow-up forms, management training reports, sign-in sheets and evaluation forms into Center IC software.
- Act as back up for data transfers between Center IC software, EDMIS and Salesforce.
- Develop and maintain physical and electronic data management systems and internal auditing

processes that allow for compliance with grants.

- Act as back up to provide impact and demographic data for grant compliance reports and for CSBDF's Policy and Research department on a regular basis and upon special request.
- Greet visitors, answer phones, and provide general information to the public.
- Attend networking and outreach meetings in the community.
- The Client Intake Specialist is expected to work a 40-hour week, as described in the Personnel Policies, and to observe the WWBC's office hours of 9:00 a.m. to 5:00 p.m. Occasional evening or weekend hours may be required.
- As directed, attend conferences, seminars, conference calls, training sessions on behalf of Carolina Small Business Development Fund and the Western Women's Business Center.
- Performs other duties as assigned.

Finance Functional Area:

- Participates in the annual SBA audit of client files and reporting with the SBA Regional Area Representative.
- Reviews client session notes and invoices that are provided by WWBC Business Consultants.
- Determines if WWBC clients qualify for TA grants and funding opportunities available and request required documents to ensure eligibility.

Policy and Research Functional Area:

- Functions as a back-up to provide impact and demographic data for grant compliance reports and for CSBDF's policy and research function on a regular basis and upon special request.

Minimum Requirements:

- Bachelor's Degree in Counseling, Business Administration, Finance, Economics, or other such field that supports the organization's model.
- At least two years' experience in small business lending or delivering technical business management assistance OR three years of experience with programmatic and project development and management.
- Strong written and oral communication skills.
- Strong organization skills and project management experience
- Exceptional public speaking and relationship building skills.
- High attention to detail
- Understanding and strong interest in poverty alleviation strategies, especially those focused on the role of women in economic development and small business development.
- Ability to work with a diversity of clients, in terms of ethnicity, life experience, income levels.
- Spanish language skills are preferred.
- Ability to adjust work schedule to include evenings and weekends as needed to accommodate training program schedule.
- Strong computer skills for data entry, record keeping, report writing and analysis.
- Maintains and supports a shared collaborative team culture in person and virtually.

Physical Demands

The physical demands described here 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 functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate computers and office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.
- The employee is required to interact with the general public, small business owners and others.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 20% of the time. Employee must hold a driver's license and be able to travel outside of the office for meetings, conferences, and other job-related commitments.
- From time to time employee will be expected to hold training events, attend community events, attend out-of-town conferences and represent the organization in addition to the normal business schedule.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Compensation:

We offer a competitive salary that depends on prior experience. Our benefits package includes Medical, Dental, Vision, Short Term Disability, Long Term Disability, 401k Account with employer match, plus generous vacation and sick time.

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