**Small Business Specialist I (Dallas)**

***About PeopleFund.*** PeopleFund is a non-profit Community Development Financial Institution serving entrepreneurs in the State of Texas, and Veteran entrepreneurs nationally. We have a mission to create economic opportunity and financial stability for the underserved by providing access to capital, education, and resources in order to support healthy small business growth. Our vision is to be the premier non-profit lender in our space, and we execute our mission through values of service before self, integrity, and excellence in all that we do.

Primarily, PeopleFund serves small business owners through loan capital, both government-guaranteed (SBA) and other sources. PeopleFund also provides education and resources for clients both pre- and post-loan as a strategy for ensuring our clients are successful. In addition, we also have strong New Markets Tax Credit involvement, are the fiscal agent for a national Veteran lending collaborative – VET, LLC, and run several special projects and programs. Our goal is to ensure that everyone has the opportunity to achieve the American dream.

***About the Role.*** PeopleFund is seeking a well-rounded business generalist with strong relational skills to serve as a Small Business Specialist for our clients. This role will focus on providing small business owners and aspiring entrepreneurs with guidance and resource support through one-on-one business coaching and group education. The goal of coaching sessions serve to help entrepreneurs plan, execute, and scale business concepts. This Small Business Specialist will guide business owners in a variety of capacities to create real, lasting change by partnering on the macro, micro, and long-term goal of economic development (access to capital and job growth).

***Job Duties.*** This role will focus on the following primary responsibilities:

* Support primary point of contact for technical assistance related contracts
* Provide business coaching, group training, and online training to business owners and aspiring entrepreneurs (capacity of up to 70 clients monthly)
* Works closely with the lending team to prepare potential borrowers to access capital through business plan and financial plan preparation
* Maintain a working knowledge of ongoing small business opportunities and resources
* Connect clients to professional resources in the community to help meet their business needs successfully managing and facilitating professional and client relationships
* Coordinate mentor pairings between existing clients and professionals in the mentor network
* Lead workshops and small business orientations for clients and partners
* Collaborate with resource partners in the Small Business Ecosystem on outreach, events, and workshops
* May be required to attend events and engagements both during normal working and outside of normal working hours
* Track set metrics for job evaluation and community impact monthly
* Maintain accurate records on cloud server
* Provide data to support the needs of grant and contract reporting, when necessary
* Other duties as assigned

***About You.*** PeopleFund seeks the following qualifications in a desired candidate:

**Experience.**

* Located in the DFW area
* 1+ years of business startup experience
* 1+ consulting, coaching, or advising small business owners
* Experience managing partner, vendor, and contractor relationships
* Experience with compliance management
* Experience with client case management
* Proficient in Microsoft Office 365
* ***Bilingual Required\****

**Education.**

* Bachelor’s degree in business administration or a related field

**Professional Qualities.**

* Detail-oriented
* Flexible and adaptable to continuous change
* Able to manage multiple responsibilities within the role
* Meets deadlines in a fast-paced environment
* Willing to work remotely and autonomously, if needed
* Fosters strong team and interdepartmental communication
* Tech-forward
* Approaches work challenges with a positive attitude
* Helps to foster a culture of evaluation and improvement
* Skilled in technical writing and data management and has the capacity to manage administrative reports

***Position Information.*** Read below for additional information about the position.

**Type of Position:** Full-time (exempt)

**Hiring Tier:** Entry - Proficient

**Supervisor:** Manager of the Training and Education Team

**Main Team:** Training and Education

**Sub-team:** Technical Assistance

**Travel:** Up to 50% of the time

**Compensation:** $45,000 + $6,000+ in annual bonuses (dependent on performance)

**Potential Career Pathway:** Small Business Specialist I,Small Business Specialist II – Small Business Specialist III – Technical Assistance Manager – Sr. Technical Assistance Manager

***Key Performance Indicators (KPIs).*** The metrics listed below are helpful in determining how your performance in this position will be evaluated:

* 180+ business advising appointments per month (team goal)
* 85-90% customer satisfaction rating on post-assistance surveys (Net Promoter Score or NPS) (team goal)
* 12+ loan conversions quarterly totaling $750,000 (team goal)
* 15+ business plans completed quarterly (team goal)
* 30+ lending readiness assessments completed quarterly (team goal)
* 45+ jobs created or retained quarterly (team goal)
* 1,350 hours of Technical Assistance logged quarterly (team goal)
* 1,500 individuals served annually (team goal)
* Additional achievements derived from coaching

\*Team KPIs based on a 3 person SBS I team

***Benefits.*** PeopleFund provides the following benefits for employees:

* Medical, dental, vision, and life insurance (PeopleFund pays 100% of the base medical insurance premium for the employee)
* Paid time-off earned each pay period (starts at 120 hours annually)
* 11 paid holidays annually
* Flexible work schedules and the ability to manage your own schedule
* Work from home or PeopleFund office supported
* Use of the company vehicle for work-related purposes
* Flexible Spending Account (FSA) and Health Savings Account (HSA) available for qualifying medical plans and expenses
* Dependent Child Care Spending Account available to employees who qualify
* 401(K) retirement plan with 4% employer match
* Monthly cell phone allowance $50.00 - if configured and used to receive and send PeopleFund calls and emails on a personal device

**To apply for this position, please upload a resume and cover letter to:** [**https://peoplefund.org/employment/**](https://peoplefund.org/employment/)**.**