



Community Futures Development Corporation of Central Okanagan

Program Administrator

The CFDCCO Program Administrator is a high value role in the organization. The new person hired will be expected to work closely and collaboratively with CFDCCO management, business advisors, program managers and other staff to help ensure that CFDCCO loan clients and other program clients have a high value and quality experience with the organization's loan and program services. This is a new position created to prepare and transition the CFDCCO for pending senior administrative staff retirement in early 2020. The person hired to fill this position will be given progressively increasing responsibilities in the below areas of responsibility as they are oriented and trained in various areas of the organization. As a result, there is advancement opportunities in the organization.

Fund Administration:

- Will ensure that clients are treated respectfully, requests are responded to in a timely manner, needs are given fair and proper consideration and confidentiality is maintained at all times.
- Is responsible for providing investment and loan portfolio accounting, administration and investment assessment support.
- Responds to requests for financial and other forms of assistance including analysis and assessment of business proposals, preparation of applications for adjudication by Loans and Investment Review Committee and follow-up with clients regarding their application.
- Prepares all loan and investment documentation, registrations and agreements prior to disbursement of funds including Equifax credit checks, Personal Property Registry searches and other registrations and loan file documentation.
- Administers loan and investment portfolio of active loans, loans in arrears, investments and collection activities.

Business Analysis and Development Support:

- Utilize new and proven tools, techniques and practices for investigating and determining the credit worthiness, improve processing and administration of an application.
- Retrieve and analyse consumer and/or commercial credit score reports from Equifax Canada.
- Provide research support in the determination of security valuations for loan applications.
- Ensure that documentation and investigation of all loan applications is done accurately and comprehensively.

Loan Program Administration:

- Following approval, prepare loan check list and draft loan offer for new loans and correspond with clients as to all items required prior to loan disbursement.
- Prepare and register all appropriate loan security prior to loan disbursement.
- Prepare letter and documentation to be sent to lawyer for any mortgage registrations or legal work to be done.
- Assist with overall filing and administrative support to the Loans and Investment department.
- Develop spreadsheets and reports for information, evaluations, proposals, budgeting purposes etc. from the client database system (TEA).
- Review and provide suggestions on any potential loan policy and procedures manual revisions and updates.
- Prepare loan review and loan collections kits for delivery to committee members.
- Prepare agenda and in-depth report, doubtful and write off requests for regular portfolio review and collections meetings.

File Administration

- Set all new loans and investments up in the TEA client database.
- Work with all staff to ensure all necessary TEA entries are entered into TEA and prepare and submit WD quarterly report.
- Be the lead contact with TEA software development team and perform lead administrator for updates and maintenance of the TEA client database system.
- Ensure all loan check list requirements are completed for internal auditor sign off
- Closing out of paid out accounts, release of security and insurance, final amortization schedule and preparing closing letters to clients.
- Annually purge loan files for storage and/or destruction.
- Perform Equifax Canada administration and liaison person for the office. Prepare and submit monthly Equifax reports as required under contract.
- Prepare annual loan portfolio breakdown and information for auditor review.

Client Liaison

- Meet with clients to review the loan offer and other loan security documents and have them sign all necessary documentation.
- Work with existing clients and Business Advisors in regards to any client repayment concessions or security revisions. Prepare loan amendment letters and ensure clients signatures as required.
- Prepare preliminary client annual review information & materials for review, any necessary follow up and site visits by Business Advisors.
- Work with clients on all arrears and collection activities, bringing any concerns to the Business Advisors for assistance and further follow up.

Portfolio Management and Accounting

- Prepare any files for external collection activities - legal, bailiff, collection agency.
- Process monthly loan payments through DEFT system on a bi-monthly basis and manual cheques, merchant card deposits and postings as required. Prepare any inter-fund on-line transfer sheets as required.
- Accrue and post interest quarterly on accounts where monthly payment is missed.
- Prepare monthly and quarterly loan portfolio and statistical reports for management and committee review.
- Cross check portfolios to general ledger on a monthly basis. Update cash flow actuals monthly for cross reference to general ledger.
- Reconcile investment fund bank accounts.
- Performs other duties and responsibilities as necessary in the performance of the position and as assigned by the Manager.

Other Program Administration and Support

- Be familiar with all aspects of CFDCO programs and services so you can answer general inquiries, redirect calls and emails, provide marketing support and community liaison support.
- Provide administrative and back-up support to Accounting and Self Employment programs.
- Provide client general support when required - answer reception phone, respond to general email inquiries, voice messages and drop-in inquiries.
- Have a good understanding of CFDCO computer systems, local area network server, data back-up and general computer care and maintenance.



Key Attributes Required:

- Good customer experience management.
- Cooperative team player.
- Strong organizational and systems skills – both physical and digital.
- Computer literacy and problem solving abilities.
- Finance, accounting and administration abilities and experience.
- Patience, persistence, empathy, critical thinking, collaboration skills.
- Combination of related experience and education related to the duties of the position.
- Have an interest in community economic development, impact investing and non-profit organization management and administration.
- Small business and entrepreneur experience.

Employee Development and Details:

- January 2, 2020 expected start date
- January 2, 2020 – March 31, 2020 three-month probation and training/orientation period
- Benefits to begin after 3-month probation period – comprehensive medical, dental, disability, matching group RRSP contribution up to 5% of income.
- Begin recruitment November 1 – interview and hire decision by December 15th
- Full time 35 hours per week 8:30 am – 4:30 pm
- Starting wage range \$20-\$22/hr.

Applications by email to: Larry Widmer, General Manager email:lwidmer@cfdccco.bc.ca