



Position: Business Development Officer
Reports to: Chief Development Officer
Department: Capitalization
Location: Remote
Position Type: Full-time, Exempt
Start Date: Fall 2022

Working Solutions CDFI (www.workingsolutions.org) is a certified, nonprofit Community Development Financial Institution (CDFI). As the *First to Believe* in start-up and early-stage entrepreneurs, Working Solutions (WS) makes affordable capital—primarily microloans of \$5,000-\$50,000—available to small businesses and provides business consulting in conjunction with every loan. WS is committed to connecting with communities that have historically not had access to capital and places an additional priority on serving lower-income individuals, women, and entrepreneurs of color.

Acutely focused on high social impact, WS mapped out an ambitious five-year strategic plan in 2019 to reach \$50MM deployed to small businesses by 2024. Over the last three years, WS has delivered outstanding YOY results and is on track to meet this goal, connecting more than 3,000 local entrepreneurs to critical capital and consulting along the way. Headquartered in San Francisco and lending in the Bay Area since 2005, WS recently answered the call to expand its footprint to 19 counties throughout Northern California, encompassing more than 20,000 square miles and an estimated 2 million entrepreneurs.

As a continuously learning organization, WS has made significant investments in its team and operations to improve the entrepreneur experience. WS' financial and impact successes and local and national visibility speak to its commitment to core markets, staff, and excellence in getting the job done. WS is looking for new community-minded change makers committed to being part of this small but mighty industry leader to grow loan deployment volume and set new sights for the years ahead. Come be a part of this vision!

Position Overview:

The Business Development Officer (BD) will be responsible for generating a pipeline of prospective clients by: (1) building referral relationships with banking and other financial institutions across WS' 19-county footprint; 2) working in conjunction with the WS Communications Team to harness digital outreach tools that will increase lead generation and conversion rates; and (3) within the first 12 months, cultivating partnerships in the South Bay—with an initial focus on Santa Clara, Monterey, San Benito, and Stanislaus counties—to increase visibility and generate leads. This person must be a stellar presenter and partnership manager with outstanding verbal and written communication skills who is comfortable with in-person, boots-on-the-ground outreach. The BD will be a change agent who is passionate about reaching financially marginalized communities with WS products.

Key Duties:

- Cultivate relationships with banks, small business lenders, and other financial institutions to promote lead generation and referrals;
- Engage community partners, civic organizations, trade organizations, businesses, and education centers to generate new partnerships for volume and quality client referrals;



- Conduct outreach in WS' South Bay footprint—with an initial regional focus on Santa Clara, Monterey, San Benito, and Stanislaus counties—through in-person meetings and presentations and by using digital tools to reach WS' key markets;
- Build new referral partnerships and prioritize lead generation sources to maximize outreach, volume of quality leads, and increase conversion rates with a focus on start-ups, lower-income individuals, women, and entrepreneurs of color;
- Triage new leads and refer business owners to WS' Community Development Team as needed or to external business support resources, as applicable; and
- Enter data into CRM and work across teams to watch data trends and adjust outreach strategies for improved lead quality.

Qualifications:

- Bachelor's degree or relevant work experience required;
- Outstanding written and verbal communication skills, with cultural competency to connect with a diverse audience;
- Strong presentation skills, both in-person and in the virtual environment;
- Strong customer service and relationship-building skills with an awareness of how to connect resources and increase referrals;
- Knowledge of banking or small business experience a plus;
- Knowledge of digital communication and social media tools a plus;
- Proficient with virtual office environment and tools including, but not limited to: Zoom, Outlook, and comfortable tracking data via Salesforce;
- Self-starter with the ability to work independently, but also values communication to keep in touch with team and larger organization;
- Demonstrates sound judgment and effective decision-making skills;
- Experience with the CDFI industry highly preferred;
- Spanish language skills preferred;
- Demonstrated commitment to diversity, equity, belonging, and inclusion practices;
- Commitment to Organizational Values of: 1) Economic opportunity for those historically excluded from mainstream finance; 2) Transparency, integrity, and respect for all; and 3) Significant social impact; and
- Self-awareness with a flexible, growth-oriented mindset for a great culture add.

Salary Commensurate with Experience

Excellent Benefits: Working Solutions offers a competitive salary based on industry best practices, as well as an excellent benefits package, including employer-paid medical, dental, vision, disability, and life insurance; a 401(k) retirement savings plan with employer match; flexible spending accounts (medical, dependent care); commuter benefits; professional development funds; generous paid time off; gym, telephone, and internet subsidies; and an Employee Assistance Program (EAP).

Application Deadline: Open until filled.

Please email resume and cover letter with the subject line "Business Development Officer" to jobs@workingsolutions.org. *No phone calls please.*

Working Solutions is an Equal Opportunity Employer.