Job Description
Loan Fund & Fiscal Sponsorship Associate

Position Summary
The Associate supports the Lending and the Fiscal Sponsorship programs. The position’s core responsibilities focus on program administration, team member support, and client support.

Essential Job Functions
Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The following list is not designed to comprise a comprehensive listing of activities, duties or responsibilities that may be required for this job. Duties, responsibilities and activities may change at any time with or without notice.

- Provide administrative support for the Loan Fund and Fiscal Sponsorship team. This includes data entry, sending correspondence and providing general operational program support.
- Prepare and coordinate documents and information management in accordance with Loan and Fiscal Sponsorship policies and procedures.
- Processing financial disbursements and payments, organizing and preparing required documents/entries, coordinating with loan and finance staff, and meeting reporting requirements.
- Organize and maintain files for each borrower/client.
- Prepare required reports for weekly loan committee meetings.
- Maintain calendar and room reservations (in office and virtual) for all loan and fiscal sponsorship committee meetings.
- Enter and maintain application and approval data in Salesforce.
- Enter and maintain client pipeline data in Salesforce.
- Coordinate orders for services and payment on accounts for title insurance, UCC filings, legal searches, and credit reporting, working closely with lenders.
- Prepare and mail or email monthly billing statements for all clients.
- Respond to all client audit confirmation requests.
- Maintain the Lending Data Quality Dashboard.
- Participate in program development, as well as setting and meeting individual, team and organizational goals.
- Other duties as assigned or required to meet program and organizational needs.
Qualifications

- Aptitude for and interest in working with numbers.
- Organized and action-oriented, with proven time-management skills and keen attention to detail.
- Exceptional communication skills and follow through.
- Ability to make decisions and act within established policies and procedures.
- Problem solving skills and ability to resolve conflicts.
- Confidence with technology. Will have the ability to use various programs and tools effectively, including complex databases and spreadsheet applications to analyze and report data.

Education and Other Training:

- Required:
  - Associate degree is preferred or the equivalent combination of education, training, and experience
  - 1-2 years’ experience in database use and management
  - Proficiency in Microsoft Excel, Word, DocuSign
- Preferred:
  - Prior experience in nonprofit organization

Compensation

Salary range: $40,000 – $43,000

Excellent benefit package includes medical, dental, life, and disability insurances, along with retirement and generous leave policies.

Interested candidates should send a cover letter and resume by 5 pm on Friday, January 8, 2021, to Phil Hatlie, Capital Access Director, at phatlie@propelnonprofits.org.

Propel Nonprofits is an equal opportunity employer.
About Propel Nonprofits
Propel Nonprofits fuels the impact and effectiveness of nonprofits with guidance, expertise, and capital. Its services include accounting and finance, board governance, fiscal sponsorship, lending, skills and knowledge sharing, strategic consulting, and training. Propel Nonprofits serves nonprofit organizations in Minnesota and the adjacent states of Wisconsin, Iowa, North Dakota, and South Dakota.

About our Services

Lending: Propel Nonprofits is a federally certified Community Development Financial Institution (CDFI) offering loans to nonprofit organizations in Minnesota and adjacent communities to expand programs and services, bridge cash flow gaps, and purchase and renovate buildings.

Technical Assistance: TA helps nonprofits understand their financial situation, identify priorities, and develop a plan of action for the near and long-term future.

Training: The training program offers 100-150 training events annually on topics related to nonprofit finance, strategy, and governance.

Strategic Consulting & Board Development: Propel Nonprofits’ consulting team works with nonprofits to develop strategic and operational plans, provide customized board training and facilitation, and chart new paths for collaboration and partnerships.

Accounting and Finance: Our staff of experienced accountants work with nonprofit to tailor QuickBooks Online for their needs, develop in-house accounting expertise, and support nonprofit clients working with Propel Nonprofits’ other programs.

Fiscal Sponsorship: Our fiscal sponsorship program works with dozens of mission-driven organizations, projects, causes, and collaborations annually to test drive ideas as they build infrastructure, set goals, and develop their business models. As fiscal sponsor, Propel Nonprofits offers the ability to accept charitable contributions while waiting for IRS 501(c)(3) application approval; we also offer guidance and insights, organizational development, financial and board governance templates and trainings, and a bridge to helpful relationships.

Resources: Propel Nonprofits has developed an extensive online library of videos, articles, financial examples and templates, and glossary of financial terms.
Our Guiding Principles & Core Values
At Propel Nonprofits, we’re in the business of powering those on the frontlines working for the good of our communities, which requires dedication and a shared vision. Our Theory of Change is that when nonprofits are well led, well resourced, and well connected they achieve mission success. As we work toward our mission of fueling the impact and effectiveness of nonprofits with guidance, expertise, and capital, we use these principles as a strategy screen, as accountability markers, and as a handshake, whether you’re new through our door or an old Propel friend.

Champion nonprofits
We love nonprofits – their people and their missions. We are optimistic about their ability and believe in their power to change the world because we see their work in action every day. They are experts at connecting communities for change, bold leaders who take risks, and folks who stand up and take action in the face of injustice. Nonprofits are champions of good; we are champions of nonprofits.

Be a mutual and trusted partner
The work of standing up for your mission takes courage, honesty, and a friend who believes in you. We enter our partnerships with respect and kindness, aiming to be the champion in your corner, a trusted confidant, and the one helping identify the elephant in the room when an issue needs to be named. “Be helpful” is one of our mottos, and for us, this means listening first, then supporting nonprofit leaders’ expertise with our own. We value honesty with empathy, and usually around a table with coffee.

Advance justice
We power nonprofits because they are helping create more just, equitable communities. Nonprofits leaders work beyond themselves to reshape systems that have historically withheld power, address the immediate gaps left by other institutions, and provide access to resources for all. We stand with them in a shared commitment to social, racial, and economic justice; as a community development financial institution, we collaborate to give nonprofits and their constituents access to capital, resources, and ownership of their decisions.

Stay curious
In an ever-changing world, we believe adaptability and creative problem solving comes from always having one more question. We love to learn from each other and from our nonprofit partners, and then generously share the insights and knowledge we’ve gained. Nonprofit leaders are experts at what they do, so we’re always building upon our own expertise in nonprofit finance, strategy, and governance to best support them through hard decisions, life cycle pivots, and ecosystem shifts.

Have fun
We embrace joy and emit optimism. This means honoring mission moments, celebrating wins and brave decisions, equipping courageous leaders and standing by them, and bringing enthusiasm and a sense of humor to our relationships and work. We take the long view and surround ourselves with people and partnerships who make us smile and help us imagine the world we’re working toward.