



Career Service Authority

Loan and Grant Processor

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GENERAL STATEMENT OF CLASS DUTIES

Performs paraprofessional work involving loan and grant support activities and assists professional staff promote economic development.

DISTINGUISHING CHARACTERISTICS

This class performs paraprofessional work involving loan and grant support activities and assists professional staff promote economic development. This class is distinguished from Community Development Officer that performs full performance professional work developing, coordinating, and implementing redevelopment projects, housing and neighborhood revitalization programs, strategies, studies, plans, and proposals for federally and locally funded community improvement projects emphasizing public/private financial cooperation, community need, project selection and feasibility, necessary technical assistance, and compliance. The Loan and Grant Processor is distinguished from the Accounting Technician that performs full performance paraprofessional accounting work maintaining a full set of bookkeeping records including summarizing accounting data and preparing financial reports.

Guidelines, Difficulty and Decision Making Level:

Guidelines are generally numerous, well established and directly applicable to the work assignment. Work assignment and desired results are explained by general oral or written instructions.

Duties assigned are generally repetitive and restricted in scope but may be of substantial intricacy. Employee primarily applies standardized practices.

Decisions or recommendations on non-standardized situations are limited to relating organizational policies to specific cases. Problems that are not covered by guidelines or are without precedent are taken up with the supervisor.

Level of Supervision Received and Quality Review:

Under normal supervision, within a standardized work situation, the employee performs duties common to the line of work without close supervision or detailed instruction. Work product is subject to continual review.

Interpersonal Communications and Purpose:

Contacts with the public or employees where explanatory or interpretive information is exchanged, gathered, and/or presented and some degree of discretion and judgment are required within the parameters of the job function.

Level of Supervision Exercised:

No supervisory responsibilities.

ESSENTIAL DUTIES

Administers and maintains loan packages including collateral documents, closes commercial small business and housing loans and grants, and performs a variety of loan support activities such as initial insurance verification, matching funds reports, woman and minority business enterprise reports, and affirmative marketing plans.

Performs initial creation of loan files and ensures all file documentation meets federal, state, and local rules and regulations pertaining to small business and housing financing and grant programs.

Prepares files for project close-out, collaborates with fiscal staff on close-out procedures and to reconcile loan balances; assures completion of all project file documentation, determines file retention period, and maintains retention calendar.

Provides information to potential borrowers and explains and promotes various funding and grant programs.

Performs preliminary and technical-level financial analysis of economic and housing development projects and loan proposals.

Provides fiscal staff with any loan/grant changes and/or modifications.

Develops, creates, maintains, and modifies computer records and/or reports utilizing a variety of software programs.

Performs other related duties as assigned.

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Any one position may not include all of the duties listed.
However, the allocation of positions will be determined by
the amount of time spent in performing the essential duties
listed above.
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MINIMUM QUALIFICATIONS

Competencies, Knowledges & Skills:

Integrity/Honesty – Displays high standards of ethical conduct, understands the impact of violating these standards on an organization, self, and others, and chooses an ethical course of action.

Attention to Detail – Is thorough when performing work and conscientious about attending to detail

Customer Service – Works with customers to assess needs, provides assistance, resolves problems, satisfies expectations, knows products and services, and is committed to providing quality products and services.

Technical Competence – Uses knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job, works with, understands, and evaluates technical information related to the job, and advises others on technical issues.

Oral Communication – Expresses information to individuals or groups effectively taking into account the audience and nature of the information, makes clear and convincing oral presentations, listens to others, attends to nonverbal cues, and responds appropriately.

Teamwork – Encourages and facilitates cooperation, pride, trust, and group identity, fosters commitment and team spirit, and works with others to achieve goals.

Conscientiousness – Displays a high level of effort and commitment towards performing work and demonstrates responsible behavior.

Problem Solving – Identifies problems, determines accuracy and relevance information, and uses sound judgment to generate and evaluate alternatives and to make recommendations.

Planning and Evaluating – Organizes work, sets priorities, determines resource requirements, coordinates with other organizations or parts of an organization, monitors progress, and evaluates outcomes.

Reasoning – Identifies rules, principles, or relationships that explain facts, data, or other information, analyzes information, and makes correct inferences or draws accurate conclusions.

Information Management – Identifies a need for and knows where or how to gather information and organizes and maintains information or information management systems.

Technology Application – Uses machines, tools, or equipment effectively and uses computers and computer applications to analyze and communicate information in the appropriate format.

Interpersonal Skills – Shows understanding, friendliness, courtesy, tact, empathy, cooperation, concern, and politeness to others and relates well to different people from varied backgrounds and different situations.

Reading – Learns from written material by determining the main idea or essential message and recognizes correct English grammar, punctuation, and spelling.

Mathematics – Performs computations such as addition, subtraction, multiplication, division, and algebraic and geometric calculations, correctly using whole numbers, fractions, decimals, and percentages.

Listening – Receives, attends to, interprets, and responds to verbal messages and other cues such as body language in ways that are appropriate to listeners and situations.

Writing – Uses correct English grammar, punctuation, and spelling to communicate thoughts, ideas, information, and messages in writing.

Flexibility – Adapts quickly to changes.

Speaking – Uses correct English grammar to organize and communicate ideas in words that are appropriate to listeners and situations and uses appropriate body language.

Memory – Recalls information that has been presented previously.

Diversity – Is sensitive to cultural diversity, race, gender, and other individual differences in the workforce.

Reasoning - Discovers or selects rules, principles, or relationships between facts and other information.

Knowledge of financial analysis and research techniques sufficient to be able to determine what information is needed, secure and analyze desired information, and formulate logical recommendations.

Physical Demands:

Sitting: remaining in the normal seated position.
Carrying: transporting an object, usually by hand, arm, or shoulder.
Reaching: extending the hand(s) and arm(s) in any direction.
Handling: seizing, holding, grasping, or otherwise working with hands.
Fingering: picking, pinching, or otherwise working with fingers.
Talking: expressing or exchanging ideas by means of spoken words.
Hearing: perceiving the nature of sounds by the ear.
Near acuity: ability to see clearly at 20 inches or less.
Accommodation: ability to adjust vision to bring objects into focus.

Working Environment:

Pressure due to multiple calls and inquiries.
Subject to many interruptions.

Education Requirement:

Associates Degree in Business, Finance, Accounting, or a related field.

Experience Requirement:

Two years of financial support work.

Education/Experience Equivalency:

A combination of appropriate education and experience may be substituted for the minimum education and experience requirements.

CLASS DETAIL

FLSA CODE: Non-Exempt

ESTABLISHED DATE: 03/01/2006

REVISED DATE:

REVISED BY:

Patricia Anderson

CLASS HISTORY

The Economic Development Associate – Small Business and the Small Business Loan Assistant have been consolidated into this new class. The job responsibilities and minimum qualifications have been revised to reflect the changes in duties and responsibilities.