

**Position Title:** Relationship Manager

**FLSA Status:** Full-time

**Starting Salary:** \$18/hr

**Benefits:** Once eligible, 3% match for Individual Retirement Account and 15 days paid time off. For full-time and part-time, 10 paid holidays, two paid half days.

**Supervisor's Title:** Senior Relationship Manager

**Location:** Buffalo, NY

**Organization Mission:** WEDI strengthens communities through a continuum of educational and financial resources, removing systemic barriers to economic equity for all Western New Yorkers.

**Website:** [www.wedibuffalo.org](http://www.wedibuffalo.org)

**Organization Overview:**

Founded in 2006 by members of the Westminster Presbyterian Church to improve the quality of life for residents of Buffalo's West Side, WEDI (the Westminster Economic Development Initiative) has two focus areas — Education and Economic Development — and numerous programs across both departments. This dual focus makes WEDI unique among its peers.

With a passionate and diverse staff, WEDI is well-equipped to realize its vision that all residents of Western New York can succeed and thrive in a culturally inclusive community.

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**Position Summary:**

WEDI's Relationship Managers (RMs) guide local small business owners through our microloan and Entrepreneurial Assistance Center (EAC) programming. RMs regularly communicate with engaged business owners to promote utilization of WEDI's technical assistance (TA) services. By building a relationship founded on trust, RMs work to promote access to capital and resources for previously underserved and underbanked small business owners.

The position is well-suited for those looking to combine entrepreneurial skills with excellent customer service and inclusive community development. Attendance at occasional small business events outside of the standard work schedule is expected.

**VISION**

All residents of Western New York can succeed and thrive in a culturally inclusive community.

**MISSION**

WEDI strengthens communities through a continuum of educational and financial resources, removing systemic barriers to economic equity for all Western New Yorkers.

## **Essential Functions and Responsibilities:**

### *Loan Program*

- Guide prospective borrowers through the microloan application. Answer questions regarding the application process and program specifics.
- Regularly communicate with clients to check on application progress and business needs.
- Conduct a brief cash flow analysis to ensure the applicant has enough income to cover existing expenses and debt. Review credit history to ensure the applicant is aware of any severe credit issues.
- Verify loan applications are complete before sending them to WEDI's Underwriter for review. Maintain a thorough understanding of the application's relevant personal and business information to answer questions during the review process.
- Regularly contact borrowers to ensure that the business is maintaining viability. Work with clients that have missed payments to resolve any delinquencies and promote business viability.

### *EAC Program & Technical Assistance (TA) Services*

- Provide one-on-one business training to business owners.
- Maintain an understanding of business planning, the Business Model Canvas (BMC), and relevant industry trends.
- Help connect clients with WEDI's network of business support specialists and partner organizations.
- Maintain accurate files and records of all assigned business owners – including a log of all interactions related to business support.

### *General*

- Display thorough understanding of WEDI's policies and procedures, particularly those relating to WEDI's lending and business support.
- Represent WEDI at events in the small business ecosystem.
- Assist in promoting effective, transparent, and accessible programs for local small businesses.

**Preferred Qualifications:**

- A degree in business, economics, finance, and/or political science. Other majors related to social sciences or public policy will be considered.
- Strong communication and customer service skills. Demonstrated ability to adapt to a wide variety of audiences.
- Basic understanding of lending, finance, and small business.
- Clear passion to promote local small businesses and access to capital.
- Demonstrated self-starter who goes beyond job description to make sure goals are achieved.
- Very organized, detail-oriented, with strong database and Excel skills.
- Consistent work output. Responsive to both clients and co-workers.
- Fluency in other languages is preferred.

**Physical Demands:**

- Must be able to sit or stand for long periods of time. Exert up to 50lbs. by pushing, pulling, or lifting.
- Regular travel to events by car, walking, or public transportation.
- Viewing a computer monitor for long periods of time. Frequent alpha/numeric keyboarding.
- Able to talk/hear and communicate with others – with or without reasonable accommodation.

**Organizational Policy/Procedure Compliance:**

- Follow all organizational policies and procedures as well as local, state, and federal laws.
- WEDI does not tolerate sexually, violently, or other unlawfully discriminatory actions, gestures, harassment, or statements. Any of these behaviors are subject to personnel action up to and including immediate termination. Such actions must be reported to the supervisor immediately.
- Always maintain confidentiality of organizational records and information.

We are looking for people who share our community-driven vision.

**If you are interested in applying, please send a resume *and* cover letter to [jobs@wedibuffalo.org](mailto:jobs@wedibuffalo.org).** We look forward to hearing from you!

This position is anticipated to start – **Monday, May 19<sup>th</sup>** (*flexible start date*)