



BUSINESS COACH

The Organization

In March 2020, Opportunity Fund, the country's leading nonprofit small business lender, and the Accion U.S. Network, the U.S. affiliate of global nonprofit Accion that has led a nationwide network of community lenders since 2011, combined efforts to form Accion Opportunity Fund/Opportunity Fund.

The nation's 30 million small business owners often lack access to affordable credit from responsible lenders offering attractive loans and services. Industry estimates suggest that there is an \$87 billion annual market gap in loans less than \$100,000 for Main Street entrepreneurs. Addressing this gap can ensure that small business owners can sustain their enterprises; drive job creation; and stimulate regional economies through increased wages, spending and tax revenue.

Leveraging the strengths of both organizations, Accion Opportunity Fund will spearhead the development of a national microlending strategy to meet the credit needs of small businesses – developing new products, establishing new partnerships, promoting research and financial education, and leveraging digital technologies and data analytics to support mission-driven lending.

Opportunity Fund remains as an independent Community Development Financial Institution (CDFI) focused on expanding its lending and advisory services in California and other markets in the US. *Our mission to drive economic mobility by delivering affordable capital and responsible financial solutions to determined entrepreneurs and communities.*

The Role:

Reporting to the VP, Partnerships & Development, Accion Opportunity Fund (AOF) is seeking a Business Coach who is fluent in English and Spanish to join our team. The Business Coach will be responsible for providing support and guidance to underserved individuals and small businesses. Particularly those owned by people of color, women, and low- and moderate-income who come from a wide range of industries nationally. The Business Coach will provide high-quality coaching to entrepreneurs to help them grow their business by assessing their strengths and weaknesses, helping them refine their goals and action plan, providing support and guidance on a range of business topics, connecting them with external partners and resources that can support their success, and maintaining engagement to assess their progress over time. This is a Fully Remote position.

Key Responsibilities/Accountabilities:

- Provide one-on-one coaching and technical assistance in English and Spanish to AOF's small business loan clients over the phone or virtually on topics related to growing a business and getting loan ready.
- With input from key stakeholders, develop coaching process for entrepreneurs, including assessing strengths and weaknesses, working with entrepreneurs to set goals and develop an

action plan, identifying and providing tools and resources to support the entrepreneur in reaching his or her goals, tracking progress, and collecting feedback.

- Conduct outreach to promote opportunities for technical assistance, including one-on-one support and support via webinars, workshops, and partners.
- Identify potential partner organizations with which we could work to provide wraparound support to small business owners nationally.
- Develop and deliver engaging educational content for webinars and workshops, including written materials and presentations.
- Support colleagues in development of outreach strategies to reach clients of greatest need.
- Support colleagues in creating marketing and communications materials to promote learning opportunities via targeted email and social media.
- Engage and equip colleagues with information that will help them promote our technical assistance offerings and share insights about trends, challenges and needs of the small business owners.
- Develop metrics of success that will be tracked to ensure clients benefit from the program and create processes to measure impact.
- Support colleagues in identifying and developing stories and narratives that demonstrate the impact of our coaching activities.
- Solicit input from frontline staff who engage with small business owners on their challenges and generate ideas for programming that the organization could consider to be responsive to those challenges.
- Understand AOF's loan products and refer loan-ready clients to the Sales team when possible.
- Some domestic travel for events required.

The Person:

Highly qualified candidates will share Opportunity Fund's commitment to its mission and will embody the organization's core values bringing a broad range of skills and experience including, but not limited to:

- Bachelor's degree required
- Written and verbal fluency in Spanish and English required (Mandarin or Vietnamese language skills are a plus).
- Minimum 7-10 years of professional experience working with small business owners either through entrepreneur support programs and/or via direct experience as a small business owner.
- A combination of education and experience could be considered.
- Experience in planning, leading, and managing programs or projects, including coordinating with diverse stakeholders and tracking and reporting on progress.
- Proven leadership and success in engagement and mobilization at the individual, community and organizational levels; strong interpersonal and relationship building skills, with the demonstrated ability to engage and influence others. Success in conveying credibility, and confidence when engaging external audiences.
- Demonstrated ability to manage to an outcomes-based approach and develop and use data to inform continuous improvement; proven track record of exceeding goals; evidence of the ability to make strategic decisions; ability to navigate and balance interests of multiple stakeholders.
- Ability to maintain high level of organization, to manage several projects at once, and to meet deadlines. Attention to detail and ability to consistently follow through, with determined self-

motivation and autonomy. Experience and demonstrated success in setting effective goals, objectives, and outcomes.

- Experience in creating and delivering compelling and concise written and oral communications. Ability to convey complex ideas through brief, simple materials. Ability to understand the organization's target audience and develop effective communications strategies and materials.
- Evidence of sound judgment, discretion, and highest ethical standards.
- An entrepreneurial mindset, self-motivated, flexible, creative, comfortable in a fast-paced work culture.
- Commitment to community development and the organization's mission of empowering under-served small business owners.

Perks & Benefits:

Our mission is what motivates us to come to work each day. We know that happy employees are productive employees, which is why we offer a comprehensive benefits package that includes:

- Competitive salary commensurate with experience.
- An environment that values work-life balance.
- 100% company-funded Medical, Dental, Vision, Life & Disability coverage for employees. Family coverage is also available.
- Tax deferred & Roth 403(B) Retirement Plan with employer match.
- Paid vacation (increased with tenure), holiday, sick, and family leave days.
- This is a Fully Remote position.

To Apply:

Interested candidates should click [here](#) to apply to the job online.

Diverse candidates are encouraged to apply.

Opportunity Fund is an Equal Opportunity Employer. www.opportunityfund.org