

**Jefferson County
Position Description**

Name:		Department:	Economic Development		
Position Title:	Financial Partnership Manager	Pay Grade:	11	FLSA:	Exempt
Date:	June 2024	Reports To:	Executive Director of Economic Development		

Purpose of Position

The purpose of the Financial Partnership Manager position is to bridge the gap between financial institutions, investors, and various Jefferson County financial departments and Committees by fostering collaborative relationships that leverage financial expertise and data insights for mutual growth and success.

Essential Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Oversees the administration of multiple revolving loan funds, including processing loan applications, monitoring, and reporting on status of loan portfolios, ensuring compliance with funding requirements, and coordinating with borrowers to facilitate repayments.
- Manages the loan application process from start to finish, including initial consultation with applicants, assessing loan viability, advocating for the project in loan committee, and ensuring timely disbursement and repayment.
- Identifies and engages potential investors for the revolving loan funds. Cultivates and manages relationships with current investors to ensure their interests are met and provide regular updates on fund performance.
- Develops and proposes unique financing structures that responsibly support strategic priorities.
- Assists with the development of a long-term revenue strategy in collaboration with the Executive Director, Executive Committee and Finance, and Audit & Compliance Committee. This includes becoming CDE, CDFI, or CHODO and would also include identifying grant funding to support the work.
- Provides oversight to our HUD program, including compliance with reporting requirements, program monitoring, and ensuring adherence to federal guidelines.
- Acts as a primary liaison to our Finance, Audit & Compliance Committee, preparing reports, facilitating meetings, and ensuring effective communication between the committees and the organization.
- Supports the Executive Director in developing annual budgets for the organization. Monitors budget performance and provide insights and recommendations to ensure financial stability and growth.
- Participates and supports the Intentional Economic Growth and Housing Initiatives established by the County as outlined in the Strategic Plan.
- Actively pursues opportunities with federal and state economic development programs to secure additional funding or partnerships that can benefit Jefferson County.
- Formulates and presents economic development policy recommendations to the County Board and other stakeholders to ensure alignment with long-term strategic goals.
- Demonstrates dependable attendance.
- Complies with County HIPAA Policies and Procedures.
- Adheres to and promotes safety as a priority in the workplace.
- Performs other duties as assigned or as may develop.

Additional Tasks and Responsibilities

While the following tasks are necessary for the work of the unit, they are not an essential part of the purpose of this position and may also be performed by other unit members.

- None

Minimum Training and Experience Required to Perform Essential Job Functions

- Bachelor's degree in Economics, Finance, Accounting, Real Estate Economics, or Business Management or related field of study.
- 2 years related experience or training.
- Ability to communicate with everyone from county citizens to C-suite. Strong interpersonal skills, with the ability to collaborate effectively with colleagues in a team environment.

Preferred Training and Experience Required to Perform Essential Job Functions

- 3 years related experience or training.
- Demonstrated capacity to understand overarching goals and objectives and to grasp the broader implication and strategic implications of tasks and decisions.

Other Requirements – Certificates/Licensures

- Valid Wisconsin Driver's License.

Knowledge, Skills, Abilities

- Ability to think outside the box and create financial solutions that meet our goals.
- Strong analytical and problem-solving skills to assess financial scenarios and devise optimal solutions.
- Capable of making sound decisions and solving problems autonomously.
- Skilled in self-motivation, prioritizing workload, and identifying and addressing potential issues proactively to maintain productivity and efficiency.
- Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents.
- Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community.
- Ability to effectively present information to top management, public groups, and/or boards of directors.
- Ability to work with mathematical concepts such as probability and statistical inference.
- Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.
- Ability to define problems, collect data, establish facts, and draw valid conclusions
- Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.
- Deep understanding of public-private partnership frameworks to effectively manage and leverage relationships with both public entities and private investors.
- Proven ability to contribute to strategic planning efforts, particularly in economic development contexts, to align tactical economic initiatives with broader county objectives.
- Ability to navigate complex legislative environments and understand relevant regulations to ensure compliance and maximize opportunities for economic initiatives.

Supervision

- None.

Physical Demands.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this position, the employee is regularly required to sit; use hands to finger, grasp, handle, or feel; reach with hands and arms and talk or hear. The employee is required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl. Lifting, moving, pushing or pulling up to 10 pounds does generally occur, but may occur when lifting boxes, books or paper. Specific vision abilities required by this job include close vision, color vision, depth perception and ability to adjust focus, distance vision.

Work Environment.

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this position, the employee is not regularly exposed to adverse conditions. The noise level in the work environment is usually moderate. This position requires occasional traveling throughout the County.

Jefferson County is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act as Amended, the County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

I have read and understand the duties of this job description and, by signing below; I agree that I can perform the duties of this position with or without reasonable accommodation.

Employee

Date

Supervisor

Date
