



JOB DESCRIPTION

Position Title: Senior Client Development Associate

Classification/Level: Exempt/Regular Employee

Reports to: Managing Director of Client Services

Summary/Objective:

Reporting to the Managing Director of Client Services, primary responsibilities include outreach to Connecticut's nonprofits to promote various financing programs and other financial assistance including grants, provided through CHEFA and its subsidiary CHEFA Community Development Corporation. Assess financial needs of the non-profits and identify CHEFA program that best meets their needs, given their financial profile. Administer the day-to-day operations of CHEFA's grant programs which include a client cycle, a non-client cycle, and an enterprise capital cycle focused on large grants that strengthen the recipients' balance sheet and help them to scale programs across the state. This position has high visibility, and the successful applicant must be able to interact with CHEFA's Board of Directors and numerous constituencies.

Essential Functions:

- Effective outreach to clients and non-clients to identify opportunities to help them meet their funding goals. Review and evaluate capital needs to determine the most suitable financing and/or funding approach. Understanding of CHEFA's eligibility requirements and strong ability to assess the financial health of potential borrowers including debt capacity analysis and financial statement review.
- Assist in developing and maintaining relationships with viable non-profit candidates to participate in CHEFA Community Development Corporation's financing programs, including participation in the New Markets Tax Credit program.
- Manage the day-to-day operations of the Authority's grant programs, including enhancing the program design, which includes the grant application process, evaluation, recommendation, and approval methodologies, and grantee reporting requirements. Present and serve as staff to the Board of Directors' Grant Committee.
- Oversee the enhancement and development of client data collection and analysis tools that demonstrate CHEFA's impact.



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- Assist in strengthening and expanding external relationships with local and state funding agencies, private financial institutions, philanthropic organizations, and other program partners.
- Monitor direct lending and grant programs and practices to ensure compliance with policies and procedures, reporting to the Managing Director of Client Services on an as needed basis regarding issues or concerns.
- Providing support to Managing Director of Client Services on special projects and requests on an as needed basis.

Required Education and Experience:

- Bachelor's degree
- Five years of related experience with a financial institution or grant-making institution, preferably serving the nonprofit sector

Preferred Education and Experience:

- Master's Degree
- Knowledge of non-profit accounting and financial analysis concepts
- Funder experience in grant program administration and evaluation
- Experience identifying and measuring community impact
- Knowledge of the federal New Markets Tax Credit Program, Community Reinvestment Act lending, or other similar financing programs a plus

Supervisory Responsibility:

This position has no supervisory responsibilities.

Work Environment:

This job operates in a professional office environment.

Position Type/Expected Hours of Work:

This is a full-time position. Days and hours of work are Monday through Friday totaling 40 hours. A hybrid work model is offered, with 3 days working in the office and 2 days working remotely.

Travel:

Day travel to visit potential clients and existing clients seeking financing or grant funding.



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Additional Eligibility Qualifications:

None required for this position.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

CHEFA is an Affirmative Action/Equal Employment Opportunity employer.