



JobsOhio Job Description

(June 2017)

Position Title: Director of Projects and Finance	Reports To: Executive Director of Operations
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Appointment Type: Full-time	Schedule and Hours: Varies as necessary
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Summary of Position: Leads and manages the projects and finance team responsible for managing job creation, retention and/or capital investment projects for the State of Ohio. Also serves as the technical expert of the state incentive and financing programs (JobsOhio and the Development Services Agency).

Overview

JobsOhio's project and finance team is responsible for all Projects (company with defined job creation, retention and/or capital investment opportunity in which Ohio is in competition), the responsibilities include managing the Project holistically, communication, adherence to processes, and program utilization.

The Director of Projects and Finance leads, manages and supervises the project and finance team, as they work on Projects, including activities such as site selection, referrals and structuring Projects with grants, tax incentives and or financing from JobsOhio or Development Services Agency (DSA) State programs. In leading the team, the Director will ensure the team has full knowledge of and adheres to JobsOhio/DSA program eligibility, guidelines and project processes from intake and vetting through execution of agreements, ensuring all details are thorough and complete.

Responsibilities and Duties

The Director of Projects and Finance is responsible to perform the following:

Manage Projects, Team and Pipeline

- Oversees team working with companies reviewing confidential company information (e.g., financial information, strategic plans) and attempting to identify the company's Project drivers (needs) and viable solutions which could include, but is not limited to, state and local incentive programs
- Coordinates and collaborates with multiple internal and external partners (or stakeholders) to ensure relationships are built and maintained, and Projects are handled timely and



adequately. This includes JobsOhio leadership, DSA, JobsOhio Network Partners (JON), as well as State agencies such as OEPA, PUCO, ODOT, Dept of Tax etc.

- Manages Project intake and assignment including assigning Projects based on defined factors, subjective factors, team capacity, relationships etc. Intake involves management of the “expansion of the team” and therefore requires Director to coordinate with JON, sectors, sales etc. to manage client’s journey
- Manages intake, assignment and process for RFI/RFP responses, and reviews final team product prior to submission to the client

Manage Site Selection

- Oversees the team working on site initiatives; including the site selection process, site selection submissions, and site related programs (SiteOhio, revitalization, site system database etc.)
- Manages teams’ engagement with companies and or consultants, as well as JON, and local economic development organizations (LEDO’s)
- Manages site selection to ensure the process is adhered to, continuous improvement recommendations are made, site submissions to client adequately meet demand, are professional and ensure due diligence was performed

Manage overall Project Structuring (vetting through Agreement)

- Oversees the team, and serves as technical expert and coach on Economic Development programs including financing and deal structuring
- Ensure project is structured holistically and within JobsOhio philosophy; considering program eligibility, policies
- Ensure Project adheres to Project Process outlined in The Project Manual from intake and vetting, offer, application, approval, and agreement stages (for JobsOhio Loans only management occurs post-execution of agreement)

Manage Finance Programs, systems and process

- Manage overall process of Financing Programs including above duties as well as coordination of 3rd party due diligence partners, loan review and loan commitment letter
- Ensures financing structures are sound, team utilizes agreed upon templates/systems, and reviews all documents prior to loan review to ensure accuracy and completeness
- Responsible for JobsOhio underwriting policy and criteria, overseeing underwriting, and ensuring project finance team is knowledgeable and adheres to underwriting policy
- Coordinates with team and General Counsel to ensure loan is processed post-loan review including outside counsel appointment, monitors loan document closing process ensuring business requirements and Project remain as negotiated, follows up with client as needed and ultimately final review prior to loan document execution
- Post-execution, loans are monitored by the project team



- Director ensures all processes, policies etc are adhered to by the team and Borrower is meeting reporting requirements as well as each loan is reviewed per contracted obligation (at least quarterly)
- Engages and responsible for loan modifications; due diligence, re-structuring, recommendations, approval process etc
- Coordinates with loan servicing provider to ensure repayment reports are monitored
- Coordinate with General Counsel, Accounting as well as Compliance

Overall responsibilities

- Performs special projects and other duties as assigned
- Utilizes JobsOhio identified systems, especially Salesforce and other systems as identified
- Attends meetings, training sessions and conferences as required
- Active participant in Project Performance Review Team
- Develops knowledge of local, state and federal loan programs to maximize coordination with JobsOhio and DSA programs and better serve business borrowers

Education, experience and skill requirements include, but not limited to:

- Bachelor's degree and completion of core coursework in finance, accounting, economics, business administration or related field;
- Required, at least five years' experience in analyzing business financial statements (including spreads, risk rating and underwriting) and/or five years' experience in commercial business loans;
- Preferred but not required, at least five years' experience in Economic Development
- Superior written and verbal communication skills to include experience preparing public correspondence and reports;
- Proficient in using word processing, database and spreadsheet software.