



capital for healthy  
families & communities

## LOW INCOME INVESTMENT FUND

### LOAN ADMINISTRATION TEAM LEADER

**Location:** San Francisco  
**Reports to:** Director of Asset Management  
**Exempt classification:** Non-Exempt  
**Status:** Regular, full-time

#### POSITION SUMMARY:

The Loan Administration Team Leader (“LATL”) will lead and collaborate on all of LIIF’s loan administration and servicing functions. The LATL will serve as a “player/manager” for a small team that handles those functions, which include: the ongoing loan servicing of a portfolio of loans made to support the development of affordable housing, child care facilities, charter schools, and other community facilities of LIIF’s own portfolio and of third party portfolios managed by LIIF; support of loan origination staff in the loan closing process, and support of asset management staff in executing loan modifications and extensions.. The LATL will be expected to provide loan servicing and support on loan closings and extensions/modifications for a portion of the loan portfolio and to give assistance and guidance to Loan Associates for the same activities.

#### REPORTING RELATIONSHIPS:

The LATL reports to the Director of Asset Management. The LATL supervises LIIF’s team of Loan Associates. The LATL will work closely with the Director of Asset Management, Chief Operating Officer, Chief Credit Officer, Managing Directors/Lending Directors, Loan Officers, Credit Associates, colleagues in the Child Care Group, and Finance associates in an effort to meet LIIF’s lending goals and objectives.

#### MAJOR DUTIES AND RESPONSIBILITIES:

- *Leadership and Administration* – The LATL is responsible for supervising and supporting the Loan Associates and leading the process for hiring new Loan Associates. The supervisory duties include managing Loan Associates activities, vacation scheduling, and performance management. The LATL, in consultation with the Director of Asset Management, will assign loan portfolios to Loan Associates and evaluate progress and quality control. The LATL is responsible for ensuring that Loan Associates adhere to credit policy and asset management procedures as they pertain to loan administration. The LATL will be involved in



implementing established, revised, and new Loan Administration processes; will maintain the Loan Administration Manual; and will analyze, recommend and implement improvements and changes to workflow processes.

- *Loan Closings* – In collaboration with the Director of Asset Management, the LATL will assign new loans to Loan Associates for closing support and ongoing servicing. To manage team workload, it is expected that the LATL will assign a subset of loans to her/himself. In an effort to make certain that timeliness and productivity standards are being adhered to, the LATL will oversee the Loan Associates in support of the loan closing process, which may include working with attorneys and title companies; reviewing, processing and filing of loan closing documents; and ensuring that all loan closing conditions are met and documented. The LATL will review and approve loan set up and funding forms prepared by Loan Associates.
- *Loan Disbursements* – The LATL will directly conduct for a subset of loans, and will oversee the Loan Associates in, review and approval of requests for loan disbursements, which will include receipt/review of periodic site inspections, title updates and disbursement spreadsheet management. The LATL will escalate issues of borrowers not performing per agreements to the Director of Asset Management.
- *Loan Servicing* – The LATL will directly conduct for a subset of loans, and will oversee the Loan Associates in, all aspects of servicing loans, which will include managing delinquencies of loan payments and monitoring loan maturities; assuring that covenants and other tickler items are tracked appropriately; ongoing maintenance of information in lending data base systems and files; processing of loan extensions and modifications; advancing interest payments; management of impound accounts; management of funds from and to loan participants; loan payoffs and archiving records; and identification and communication of loan servicing issues that may indicate a deterioration in credit quality. In addition, the LATL will help identify and establish goals and priorities for delivery of services. The LATL will work closely in coordination with the rest of the Lending Group, particularly the Director of Asset Management, Managing Directors/Lending Directors of each of the Lending Offices, and the Finance Department to ensure timely and accurate loan servicing processes.
- *Training* – The LATL will provide technical support to Loan Associates in closing loans and servicing of loans. The LAM will evaluate training needs of Loan Associates and propose training development, schedules, resources, settings, and delivery to ensure lending goals, objectives, and standards are met.

**Other Duties as Assigned.**



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**SKILLS REQUIRED:**

Five or more years experience working in finance or community development-related field in the loan administration area; good verbal and written communication and organizational skills; demonstrated ability to work in a team environment; and possess high standards for generating quality work. In addition, must be proficient in Word, Excel, PowerPoint, Microsoft Outlook; have familiarity with Access and/or other databases.

**EDUCATIONAL AND OTHER REQUIREMENTS:**

A bachelor's degree or equivalent experience is required. Strong organizational and time-management skills and an ability to be a self-starter and team player is essential. Prior management experience preferred but not required. Travel to LIIF offices with loan origination and/or asset management staff will

**HOW TO APPLY**

**Mail or email cover letter (including salary expectation & history) with resume to:**

Human Resources

Low Income Investment Fund

100 Pine Street, #1800, San Francisco, CA 94111 or

email: [careers@liifund.org](mailto:careers@liifund.org)

**No phone calls, please. Only candidates being considered for this position will be contacted.**

**LIIF, an EOE, believes that diversity ensures excellence.**