

About Windmill Microlending

Windmill supports immigrants, including refugees, who arrive in Canada with professional skills but who need Canadian accreditation to work in their field. Lacking the financial resources to pay for their training and licensing, they often fall into low paying “survival” jobs to make ends meet. Without income, collateral or credit history, it is difficult, if not impossible, for them to access financing and reach their professional goals.

Windmill addresses this problem by providing micro loans of up to \$10,000 to internationally trained immigrants so they can obtain the Canadian licensing or training they need to work in their field. Since 2005, Windmill has provided \$25 million in loans to 3,800 immigrants across Canada from a wide range of occupations. The impact of a Windmill loan is profound:

- **The income of skilled immigrants is tripled.** With the help of a \$7,000 loan, the average loan doubles or triples the recipient's income.
- **The contributions of skilled immigrants to the Canadian economy multiplies exponentially.** Every \$1 invested in Windmill returns \$15 for the Canadian economy in the first year after a borrower completes their learning plan. Loan recipients increase their tax contribution by four times.
- **Canadians, as a whole, benefit** when immigrants are able to put their skills to work in Canadian communities, particularly where there are skill shortages. 75% of loan recipients have found work in their field, most commonly as medical professionals, engineers or in the financial industry.

Windmill is the only national organization providing micro loans to skilled immigrants.

In the past decade, Windmill has grown from a grassroots organization in Calgary approving seven loans in its first year, to a national organization approving 665 loans in the past year. With over 180,000 skilled professionals entering the country each year, Windmill is working towards serving thousands of skilled new Canadians each year.

Position Description

Windmill Microlending is seeking a full-time Manager, Client Success. This role has been created to provide effective oversight and direction to the Client Success teams. The Manager, Client Success will play a key role in achieving Windmill’s goals of 1) Increasing the employment outcomes and average annual income differential of loan recipients who have completed their learning plan, over the mid to long term 2) ensuring that Windmill’s default rate stays below the thresholds set by the Board, and 3) increasing the number of loans delivered, ideally meeting or surpassing targets. This role reports to the National Director, Client Success.

The Manager, Client Success will play an important role in supporting significant growth and organizational change at Windmill, where the environment is fast-paced and entrepreneurial. This role contributes to the attainment of Windmill’s mission, and exemplifies the values of passion, empowerment, simplicity, and results in all he/she does.

Key Responsibilities of the Role:

Team Development and Management (45%)

- Lead the team of Client Success Coaches responsible for managing the loan assessment process and flow of loan applications; stewarding applicants through the loan facilitation, disbursement and repayment periods in a way that maximizes their chances of professional and economic success
- Ensure that appropriate risk management plans are in place for all loan assessments
- Work with the Manager, Loan Portfolio and the Manager, Financial Risk to decide on loans that are assessed as high-risk
- Ensure consistency of assessment, coaching and referrals to applicants
- Manage and Supervise the creation of client action plans by Client Success Coaches.
- Maintain an up to date referral database and resources that are available to Client Success Coaches for referral of Clients out to suitable services according to the results of their needs assessment
- Monitor the risk profile of applications being assessed and recommend action steps in managing the portfolio
- Escalate to National Director, Client Success, loans that cannot be decided at the team level or are recommended for decline
- Ensure that service levels are consistently met and even exceeded
- Act as coach and mentor to the Client Success staff

Program Excellence and Continuous Improvement (35%)

- Collaborate with Manager, Loan Portfolio to identify trends in the loan portfolio metrics that may improve loan assessment and coaching.
- Develop, oversee and report on Client Success metrics, service levels and compliance to Director, Client Success and identify issues that need to be addressed and resolved
- Work with Manager, Loan Portfolio in recommending, developing and implementing continuous process improvement initiatives, including the use of technology in enhancing Windmill's processes and capabilities
- Work with the Manager, Financial Risk and the Manager, Loan Portfolio to develop the risk assessment framework with a view to further enhancing its application in the loan program
- Regularly review Windmill Loan Policies and work with National Director, Client Success and National Director, Finance & Risk in recommending modifications to the CEO and Loan Committee, ensuring its relevancy with the changing environment for immigrants

Intra-Windmill Collaboration (20%)

- Work with fellow Managers to ensure that the transition from application to loan management is seamless and key learnings between departments are shared.
- Work with the Manager, Key Partnerships to ensure key learnings that will increase the quantity and quality of new clients are shared
- Work with the Manager, Loan Portfolio and the Manager, Financial Risk to ensure effective and seamless workflow is maintained amongst loan teams
- Provide feedback to National Directors on concerns or issues to enable continuous process improvements in their corresponding areas of responsibility
- Ensure that the required participation of the Client Success team in special projects is met

Direct Reports

- Client Success Coaches
- Learning Plan Advisor

What success in this role looks like:

1. Maintain a Loan Assessment turn-around maximum of five (5) business days.
2. Coaching Essentials, Case Management, and Financial Literacy Training materials are implemented within the first four months.
3. Manage a minimum of 50% client responsiveness to follow-ups for reporting and program evaluation purposes; with an expectation of growth to 70% responsiveness after 12 months.
4. List of referral partners has grown by 10% after 12 months, and includes current and accurate information for every partner.
5. Client Success team activities are within budget at the end of every quarter.

Qualifications and Knowledge:

- Over 5 years of work-related experience in Human Services and minimum of 3 years' experience supervising staff and managing or building a program.
- Experience and qualifications in career and employment counselling
- Experience with Case Management Processes and tools
- Experience working in a community-based, not-for-profit organization, preferably serving immigrants
- Intermediate to advanced MS Office skills (Word, Excel, PowerPoint, SharePoint and Outlook)
- Knowledge of various CRM software

Competencies and Characteristics:

- Strong communication skills, both written and verbal, bilingual an asset
- Strength in human resources areas of performance management, team leadership and staff coaching/mentoring, preferably in a diverse setting
- Ability to prioritize and appropriately identify and respond to urgent situations while meeting competing deadlines
- Ability to embrace and adapt to the use of new technology while supporting others in their learning.
- Ability to manage and build community in a national team environment, participating as a collaborative, professional and supportive member of Windmill
- Has a proven ability to achieve results and meet deadlines; has strong organizational and problem solving skills; has a high-energy, self-motivated approach and entrepreneurial attitude

Working Environment:

- Workstation in either Calgary or Toronto office

Salary:

- Commensurate with experience. Windmill offers an attractive compensation package.

If you meet the criteria above and are interested in applying for the position, please send your resume to hr@teamwindmill.org (reference: Manager, Client Success). We are actively recruiting for this position, so to ensure you are given due consideration for this opportunity, interested candidates should send their resume, including a cover letter and salary expectation, as soon as possible. The successful



**Manager, Client Success
Calgary or Toronto Office**

candidate will be required to provide a Police Clearance Certificate. We thank all applicants for their interest; however, only those considered for an interview will be contacted directly. No phone calls, please.