



## Title: Capital Project & Portfolio Manager

**Department:** Capital Access

**Reports to:** Managing Director, Capital Access

**Pay grade:** 5

**Business Unit:**

**FLSA:** Exempt

**Last updated:** 06/2026

## Position Summary

The Capital Project & Portfolio Manager is responsible for highly technical negotiating, structuring, and execution of complex commercial and industrial financing projects featuring up to \$5 million in program capital at risk. This position administrates multiple loan and credit enhancement programs and policy driven investment relationships designed to improve access to capital for small business operating companies. Leverage private lending and investment while simultaneously aligning the financial interest of the financing providers with that of the Michigan Economic Development Corporation (MEDC) and Michigan Strategic Fund (MSF). This position assumes a key role as a relationship manager with lenders and investors in these asset classes in the State of Michigan and ensures that the MSF, MEDC and the State's loans and investments are protected and structured to appropriately balance credit risk with the organization's economic development goals.

## Principal Duties and Responsibilities

*These duties and responsibilities are judged to be "essential functions" in terms of the Americans with Disabilities Act or ADA. The below statements are intended to describe the general nature and level of work being performed by a person in this position. They are not to be construed as an exhaustive list of all duties that may be performed by such a person.*

| Title                               | Principal Duties and Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| Capital Project & Portfolio Manager | <ul style="list-style-type: none"><li>• Conduct underwriting and credit analysis of commercial lending transactions by reviewing financial statements, operating performance, collateral, and other business documentation to assess project viability, repayment capacity, and program eligibility.</li><li>• Prepare financing recommendations and credit memoranda for loans, loan guarantees, participation loans, and other credit enhancement programs in support of Michigan businesses.</li><li>• Negotiate, structure, and execute financing transactions in collaboration with lenders, legal counsel, finance staff, and other stakeholders to ensure successful loan closings and funding.</li><li>• Manage and monitor an assigned portfolio of loans and credit enhancement investments by tracking financial performance, compliance requirements, risk exposure, and portfolio outcomes.</li><li>• Evaluate and address portfolio risks, including loan modifications, workouts, liquidations, and other actions</li></ul> |



| Title | Principal Duties and Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|       | <p>necessary to protect MSF and MEDC loans and investments.</p> <ul style="list-style-type: none"><li>• Serve as a primary relationship manager for participating lenders and financial institutions by maintaining partnerships, providing program guidance, and identifying financing opportunities.</li><li>• Conduct stakeholder outreach and business development activities to promote MEDC financing programs and expand lender participation throughout Michigan.</li><li>• Collaborate with lending partners to identify projects requiring credit enhancement support and develop financing solutions that facilitate access to capital for small businesses.</li><li>• Coordinate all aspects of transaction closing and funding, ensuring documentation, approvals, and funding requirements are completed accurately and timely.</li><li>• Monitor compliance with applicable program guidelines, lending agreements, and federal, state, MEDC, and MSF requirements.</li><li>• Analyze market, industry, and portfolio trends to support program effectiveness and inform strategic recommendations.</li><li>• Prepare reports, analyses, and recommendations for MEDC leadership and the Michigan Strategic Fund regarding project approvals, portfolio performance, and risk management.</li><li>• Performs other duties as assigned.</li></ul> |

### **Supervisory Responsibilities:**

No supervisory responsibilities.

### **Physical Demands:**

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

While performing the duties of this job, the employee frequently remains in a stationary position and operates or handles computers and office equipment, including copy machines and cell phones. Occasional standing, walking, reaching, or bending may be required. The employee must be able to communicate information and ideas effectively to ensure understanding and facilitate the exchange of accurate information. The ability to perceive, process, and interpret information in various formats is required to perform essential job functions. Specific vision abilities required include close vision and the ability to adjust focus, especially when working on a computer screen and with small numbers.



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### Travel Requirements:

Occasional statewide travel required (within Michigan).

### Work Environment:

The noise level in the work environment is usually quiet. In-office work is required for this position, in accordance with organizational work assignment policies. The position requires no exposure to hazardous site conditions while performing job duties.

## Employment Qualifications

*The qualifications listed below are guidelines for selection purposes; alternative qualifications may be substituted if sufficient to perform the duties of the job.*

### Education:

This position requires a bachelor's degree (B.A.) from a four-year college or university in Finance, Accounting, Business Administration, or Economics.

### Experience:

| Title                               | Experience                                                                                                                                                                                                                                                                                     |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Capital Project & Portfolio Manager | Two years of related experience.<br><br>Experience as a commercial credit underwriter, loan portfolio manager, commercial loan relationship manager, or tax credit or structured finance project manager for a federally regulated lender, within a related government program, or equivalent. |

### Certificates, Licenses, or Registrations:

None required.

### Other Knowledge, Skills, and Abilities:

*To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

1. Knowledge of commercial lending principles, credit analysis, and underwriting practices used to support the evaluation of business financing transactions and investment opportunities.
2. Ability to analyze and interpret business financial statements, including income statements, balance sheets, cash flow statements, and financial projections.
3. Ability to assess business risk and provide financial recommendations regarding loans, loan enhancements, guarantees, and investments of up to \$5 million based on financial, operational, and market factors.
4. Knowledge of federal, state, and program compliance requirements and the ability to interpret and apply applicable regulations and guidelines.
5. Ability to review and analyze legal, financial, and business documents, including loan agreements, operating agreements, underwriting packages, and partnership agreements.
6. Skill in assisting with financial transactions and coordinating with stakeholders to support organizational and program requirements.



7. Ability to support the evaluation, processing, and closing of commercial lending, investment, and commercial real estate transactions.
8. Strong interpersonal and relationship-building skills with the ability to develop and maintain effective partnerships with lenders, investors, businesses, and other stakeholders.
9. Ability to communicate technical and financial information effectively, both verbally and in writing, to stakeholder groups and organizational leadership.
10. Skill in public speaking and professional presentations, including the ability to present recommendations, analyses, and program information to executive leadership, public groups, and governing boards.
11. Ability to understand financing programs and structures, including those involving SBA, NMTC, and/or other public support.