

BUSINESS OPERATIONS COORDINATOR

Location	Fort Collins, Colorado (Main Office)
Reports To	Managing Principal and Principal
Status	Non-Exempt – Part-time (28 hours a week)
Schedule	Hybrid: In-office and Remote

Position Summary

The primary purpose of the Business Operations Coordinator is to support the operational, administrative, and business development functions of HCi Advisory group. This role serves as a central point of coordination across all internal operations, managing the full lifecycle of client engagements from initial proposal development and contract execution through project planning, billing, and closeout. The incumbent maintains the firm's knowledge management systems, supports Principal Managers in day-to-day administrative functions, and ensures that internal processes operate efficiently and consistently. This position also contributes to the firm's external presence and growth through business development support, marketing activities, and ongoing research into tools and industry practices that strengthen firm operations.

Business Development & Marketing

- Develop responses to Requests for Proposals (RFPs), crafting competitive, firm-specific submissions that align with client requirements.
- Proactively monitor the Housing Marketplace website to identify open RFPs and evaluate opportunities for firm pursuit.
- Maintain and regularly update reference materials for scopes of work and RFP responses, ensuring templates reflect current firm capabilities and standards.
- Develop and publish content for the firm's LinkedIn page and other social media channels to support brand visibility and business development efforts.
- Conduct ongoing research into firm tools, platforms, and industry practices as directed by the Managing Principal to identify updates and integration opportunities that keep firm operations current and effective (e.g., Claude feature updates, Asana workflow improvements, recruitment platform capabilities).

Contract, Scope & Project Administration

- Draft contracts and individualized scopes of work for new projects, tailoring each document to the specific requirements of the engagement.
- Maintain and update the internal master Contract Tracker to ensure accurate and current records of all contractual agreements.
- Coordinate and facilitate project kickoff calls with new clients, capturing notes to inform the development of project plans and identify key deliverables.

- Develop project plans in Asana, create project timelines, and assign tasks to staff; regularly monitor task completion, update project statuses, identify and address consultant blockers, and archive completed projects upon completion.
- Develop data request documents and distribute CollabSpace access instructions to clients; conduct follow-up reviews of submitted data to verify completeness and document any outstanding items.

Billing & Financial Administration

- Develop and distribute ACH payment details to new and existing clients.
- Review billing entries for client invoices to ensure accuracy and completeness prior to finalization.
- Assist accountants with preparing and finalizing client invoices, including Quadel invoicing and a pivot table summary for internal reporting.
- Manage monthly billing invoices for subcontractors.
- Maintain and update QuickBooks client contact records as needed to ensure invoices are routed to the correct staff following changes in client personnel.
- Request certificates of insurance for new clients, verifying that all submissions meet the specified coverage requirements.

Document & Knowledge Management

- Maintain and update internal team resumes and past project summaries to support business development and qualifications packages.
- Manage NetDocuments folder structure, including creation of new project folders and CollabSpaces, and systematic archival of completed projects.
- Maintain and update the HCl Master Customer Contact List on an ongoing basis to reflect changes in client leadership and staff.
- Conduct annual updates to the HCl Master Compensation Tracker with current PHA position salary data.

Administrative & Operational Support

- Manage calendars for Principal Consultants, including monitoring for scheduling conflicts and coordinating rescheduling as needed.
- Coordinate scheduling for HCl staff and communicate with external stakeholders on behalf of consultants; fulfill miscellaneous administrative requests as needed.
- Attend meetings as needed to capture detailed notes and action items on behalf of consultants.
- Provide support to consultants on client engagements as needed, including proofreading deliverables, developing presentation materials, and conducting reference checks.
- Assist Principals with travel expense recording and tracking.

- Provide training and knowledge transfer to incoming staff as needed, ensuring continuity of all coordinator functions.
- Anticipate the operational needs of internal Hci staff; proactively identify issues and implement solutions to maintain workflow continuity.
- Other tasks as needed.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Commitment: Sets high standards of performance; pursues aggressive goals and works hard/smart to achieve them; strives for results and success; conveys a sense of urgency and brings issues to closure; persists despite obstacles and opposition. This skill is characterized by the following types of behaviors:

- Takes initiative to make things happen
- Maintains positive “can-do” attitude; successfully meets or exceeds goals
- Demonstrates dedication to and understanding of the mission of the organization
- Contributes to a positive team spirit
- Takes ownership of issues and problems, even when originating in other areas
- Consistently demonstrates effort to meet and exceed internal/external client expectations
- Overcomes obstacles to complete projects/tasks successfully
- Continuously improves own performance standards and results
- Makes specific changes in work processes to improve performance
- Learns and applies new information quickly

Customer Service: Meets/exceeds the expectations and requirements of internal and external customers; identifies, understands, monitors and measures the needs of both internal and external customers; talks and acts with customers in mind. Recognizes working colleagues as customers. This skill is characterized by the following types of behaviors:

- Treats customers with courtesy and concern; responds promptly, professionally and politely
- Anticipates what customer wants, and works to provide it
- Initiates action/response to customer complaint/inquiry
- Responds in a timely, effective manner, even if just following-up
- Considers every customer interaction as important
- Always delivers on customer commitments; measures performance
- Translates customer information to others in the organization with a need to know

- Ensures that consultation, products and services delivered address the customer's needs by asking customer for feedback

Effective Communication: Ensures important information is passed to those who need to know; conveys necessary information clearly and effectively orally or in writing. Demonstrates attention to, and conveys understanding of, the comments and questions of others; listens effectively. This skill is characterized by the following types of behaviors:

- Willingly shares information
- Recognizes important information and ensures that others that need to know are informed.
- Clearly and concisely expresses ideas and concepts orally and in writing
- Listens openly and non-judgmentally
- Expresses disagreement tactfully and sensitively
- Summarizes input, then checks for understanding
- Listens without interrupting
- Uses correct grammar, spelling and punctuation
- Maintains eye contact when speaking
- Thinks through main ideas that he/she is trying to express
- Ensures information is accurate; stops rumors from spreading

Responsiveness and Accountability: Demonstrates a high level of conscientiousness; holds oneself personally responsible for one's own work; does fair share of work. This skill is characterized by the following types of behaviors:

- Will not ignore a problem, even if it is not one's direct responsibility
- Anticipates and acts to avoid a future problem
- Reacts quickly and positively to customer and co-worker inquiries
- Puts the highest priority on accomplishing objectives
- Demonstrates flexibility in balancing job responsibilities and the ability to deal with change
- Puts success of team above own interests and willingly assists others to succeed or complete tasks when needed
- Demonstrates high-level of adaptability and willingness to help as needed
- Takes responsibility for one's own actions
- Ensures fair share of work is completed
- Appropriately shares credit for work and ideas with co-workers and subordinates
- Understands the importance of timeliness and accuracy in the workplace

- Maintains a satisfactory attendance record and is consistently punctual
- Focuses on work-related activities and acts in ways which support mission and goals of the organization

Qualifications

- Bachelor's degree in business administration, public administration, or a related field, or equivalent professional experience.
- Two or more years of experience in project coordination, contract administration, or business operations, preferably in a professional services or consulting environment.
- Working knowledge of Asana, QuickBooks, and document management platforms, or the ability to learn new systems quickly.
- Strong writing skills, including experience drafting proposals, contracts, or scopes of work.
- High attention to detail and the ability to manage multiple projects and deadlines concurrently.
- Sound judgment in handling confidential client and firm information.

Work Environment

This position is based in HCi Advisory Group's main office in Fort Collins, Colorado. The role requires regular use of a computer and standard office equipment, and occasional coordination across time zones to support clients and consultants.

Name/Signature/Date

Signature acknowledges you have read and understand the contents.