



## Job Description

**JOB TITLE:** Coordinator – “Financial Foundations” (IDA Program, Jr. Investors, Money Management)

**JOB CODE:**

**DATE:** 2/1/02

### POSITION SUMMARY:

The Coordinator complements the work of the Program Director in planning, development and implementation of Financial Foundations, including the Near Eastside IDA Program, the Jr. Investors program, and financial education services. The Coordinator provides direct support to program participants, and works in cooperation with the Program Director to forward programmatic goals.

### ESSENTIAL FUNCTIONS:

1. Development: Assists in the development, planning and implementation of the major program components of Financial Foundations. Coordinates the evaluation of the programs/projects for effectiveness. Develops testing and evaluation tools to assess effects of programs.
2. Program Implementation: Coordinates programs by establishing processes that enable the program to meet its objectives, and by reviewing and recommending policies and procedures. Assists in resource development and grant writing as necessary. Collaboratively works with Program Director and others to continually identify areas for improvement or enhancement of Financial Foundations' programs. Develops strategies for continuous quality improvement within the programs, including researching instruments and processes to facilitate quality assurance. Works closely with the Program Director to assure service delivery meets or exceeds best practices in the field.
3. Marketing/Communication: Collaboratively develops marketing strategies and/or promotional materials necessary for the program. Assists in communication program objectives (ie newsletters). Coordinates with outside organizations to market Financial Foundations' services.
4. Integration: Coordinates the integration of programs/projects intra and inter agency. Coordinates activities within department.
5. Education/Training: Assists in the presentation of programs, workshops and out-reach projects. Serves as primary instructor for financial education training.
6. Operations: Assists in operational troubleshooting and in streamlining work processes.
7. Reporting: In partnership with the Program Director, designs, develops and formats reports for distribution of data. Assists with the usage of information/performance results. Documents program activities as required by funders and as requested by the Program Director.
8. Supervision: May provide daily guidance and functional supervision to assigned staff as relevant.
9. Program Responsibilities:
  - a. IDA Program: Provides ongoing enrollment, training, monitoring, support, and other services to IDA participants. Monitors participant accounts and maintains close contact with participants. Markets the IDA Program to the community and enrolls savers as accounts are available. Manages participant withdrawals, working with savers, Withdrawal Committee, and NECFCU to facilitate successful and timely process. Provides referrals and other information to IDA participants. Provides financial education/training (see below) and other projects as needed.
  - b. Jr. Investors: With the Program Director, maintains and expands our efforts to serve youth. Provides direct and ongoing enrollment, training, monitoring, support, and other services to members of the Jr. Investors program. Partners with community organizations, schools, etc, to market and grow Jr. Investors. Provides basic and topical money management training (see below).
  - c. Financial Education: Provides the majority of financial education training for IDA savers, Jr. Investors, and other members of the community, including “Making Your Money Work”; “Money Management Express”;

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“Money Wise”; “Women & Money”; topical workshops; and other curricula as needed. Partners with Program Director to provide accessible, comprehensive money management services to community.

**The preceding essential function statements are not intended to be an exhaustive list of tasks and functions for this position. Other tasks and functions may be assigned as needed to fulfill the mission of the organization.**

**QUALIFICATIONS/KNOWLEDGE/SKILLS/ABILITIES:**

- Bachelors degree, preferably in social work, social services, or related field, and 1-2 years experience working with low-income individuals.
- Experience working in educational and/or motivational settings a plus.
- Strong interpersonal skills, and experience in dealing effectively with a broad range of people.
- Strong written and verbal communication skills, including comfort with public speaking.
- Ability to work independently, track and perform multiple tasks, and manage projects.
- Ability to promote teamwork and build effective relationships.
- Knowledge of software applications.