



## **FINANCIAL EDUCATION MANAGER**

### **Position Description**

#### **Organizational Background**

Urban Edge is a community development corporation (CDC) committed to developing and sustaining diverse urban neighborhoods of choice populated by resilient families and sustained by a dynamic web of community relationships. We work primarily in Jamaica Plain, Roxbury, and surrounding areas. Our work results in community residents that are economically resilient and leaders of change, a built environment that is affordable, exemplifies good urban design and contributes to an environmentally sustainable community and a community where residents have increased access to a diverse range of needed resources and services. Our major program areas are community building and organizing, asset building, and development of high quality, high impact affordable rental and owner housing as well as educational and recreational facilities for youth and families. Since its founding in 1974, Urban Edge has grown from a small nonprofit homeownership counseling and real estate brokering organization to become one of the leading community development corporations in the country, with 22 staff and an annual operating budget of approximately \$2.5 million.

#### **Position Summary:**

The Financial Education Manager is a new position and reflects Urban Edge's evolving work in developing economically resilient families. Homeownership education, maintenance and preservation have been the cornerstone of our asset building approach to date. The Financial Education Manager will build on Urban Edge's long history of providing high quality services to low- and moderate-income families to expand our credit counseling, financial coaching and income enhancement approaches to more families in these challenging economic times. This high-energy, driven personality is able to operate both in the weeds and at 10,000 feet. S/He possesses incredible organizational skills that will be utilized to build a network of providers of work support screenings aimed at increasing the income of eligible families. The Financial Education Manager is an integral part of developing and measuring the impact of our work in close partnership with Community Building and Organizing staff. S/He works as part of the Community Programs team and reports to the Director of Community Programs.

#### **Essential Duties and Responsibilities:**

##### Work Supports and Housing Provider Network

1. Build a network of providers that utilize our technology to screen customers for eligibility for work supports.
2. Train network members in the use of the technology to achieve high standards of connections to work supports.

3. Provide technical assistance to network members to ensure that goals for customer connections to work supports are achieved.

#### Credit Counseling

1. Conduct credit counseling classes including scheduling sessions and following up with participants to assess their progress.
2. Market credit counseling programs in order to increase the number of customers with improved credit scores.
3. Recruit and train volunteers and/or interns to work with other Urban Edge programs to provide credit counseling.
4. Select financial management curricula to meet the needs of customers at varying levels of readiness and with varying goals.
5. Design and implement curriculum adjustments that integrate financial coaching.

#### First Time Homebuyer Education

1. Conduct First Time Homebuyer education courses.
2. Market courses to targeted audiences.
3. Register and prepare materials for the course.
4. Secure guest speakers as necessary for specific topic areas.

#### Evaluation and Reporting

1. Refine assessment tools to more effectively capture customer outcomes.
2. Report on progress against goals as required by various funding sources.
3. Continual process improvements including recommendations to integrate various software tools used for measurement.

#### General Management

1. Assist in the identification and development of resources.
2. Represent Urban Edge at events to advance financial education work.
3. Remain current with national trends and strategies to increase household financial security of low- and moderate-income households.
4. Other duties as assigned.

#### **Knowledge:**

- Understanding of strategies designed to increase the assets of low- and moderate-income households.
- Demonstrated comprehension of program development and evaluation techniques.
- Advanced computer software programs including Microsoft Access, Excel, PowerPoint, Publisher and Word.
- Familiarity with federal and local initiatives that support the development of assets for diverse households.

#### **Skills:**

- Proven ability and commitment to provide superior customer service to racially, culturally and economically diverse communities.

- Extremely organized and excellent follow through.
- Excellent judgment and demonstrated ability to make sound decisions within the scope of the job.
- Proven ability to anticipate, identify, and analyze opportunities and challenges; establish priorities, and efficiently allocate resources.
- Demonstrated ability to review and measure progress against specific criteria and to recommend enhancement or corrective action.
- Excellent verbal and written communication skills. Ability to effectively present information in writing including creating original materials.
- Ability to take the initiative to carry assignments beyond the original instruction in anticipation of future opportunities.
- Ability to follow general direction and work without constant supervision.

**Supervision Received/Given:**

Works under general supervision, reporting to Director of Community Programs. Assignments are received in both objective and task-oriented terms. Follows established procedures/policies/precedents. Work is reviewed for soundness of judgment and overall adequacy and accuracy. Consult with other staff on projects related to respective assignments.

**Working Conditions and Contacts:**

Work is mostly in an office setting. Works cooperatively with several departments within the organization particularly Community Building and Organizing. Has outside contacts with network members and funding sources. Will represent the organization as the prime contact on financial education projects and in partnerships related to economic resilience. Uses office equipment routinely, including, but not limited to, computers, telephones, copiers, etc.

**Typical Guidelines:****Education:**

Bachelor's degree in urban planning, business administration, sociology or other related field is required. Graduate degree preferred.

**Experience:**

One to three years program management experience in high-paced professional office setting preferably in the nonprofit or community development fields.

**Other**

Understands, and is committed to, the mission and goals of Urban Edge. Spanish bilingual strongly preferred.

**Application Information**

Please forward resume and cover letter to Maria Caceres, Office Manager, at [mcaceres@urbanedge.org](mailto:mcaceres@urbanedge.org), or mail to 1542 Columbus Avenue, Roxbury, MA 02119.