



**Job Title:** Financial Management and Education Director

**FLSA Status:** Exempt

**Supervisor:** President and CEO

**Direct Reports:** Certified Credit and Housing Counselor, College Navigator/Education Coordinator, Agency Receptionist

**The Organization** - Financial Pathways of the Piedmont provides services and resources **to help individuals achieve financial wellbeing.** The agency strives to provide credible, trustworthy assistance to help individuals and families thrive and attain their goals. The trained and certified credit and housing counselors assist families in taking control of their personal finances, saving, and building assets. We guide and coach individuals, seniors, and families at all income levels to develop money management skills, establish spending priorities, and adopt a budget suited to individual circumstances and needs. Regardless of one's age, race, income, livelihood, or first language – there is a need for financial literacy and well-being. Financial security entails **stability, resilience, and saving for the future.** In practical terms, it means a good credit score, paying bills on time, carrying moderate debt, and being able to build an emergency fund. At Financial Pathways of the Piedmont (FPP), we **help people build financial well-being** and we are the community's **financial health first responder.**

**The Opportunity** - The agency is seeking a Financial Management and Education Director

**Minimum Qualifications:** Bachelor's Degree in accounting, counseling, business or related field or high school diploma or equivalent and five years' experience in a financial related or human services related area. Certified Consumer Credit Counselor as set forth by the National Foundation of Credit Counseling. Ability to relate and maintain relationships with businesses, social service agencies, creditors, and clients. Ability to recognize and control biases and refrain from making judgments is necessary. Demonstrable computer skills and knowledge of consumer credit is desired. Has knowledge of managing people and works harmoniously with staff with while making sound judgments and demonstrating good problem solving skills. Demonstrates good organizational skills and works independently. Articulate. Must be team oriented, a good listener, and communicate effectively.

**Preferred Qualifications:** Human services, Business or related degree with two-years' counseling, social service or related field experience.

**Primary Role Responsibilities:** The position is responsible for the administration, supervision, and development of the Financial Management and Education Division by responding to the needs of the community with vision, direction, strategic planning, and implementation.

#### Financial Management

- Have a thorough understanding of the issues confronting clients. Use this information in program service development with a client driven focus in making decisions;
- Hire, provide timely training for staff, and conduct performance evaluations of staff with approval of the President and CEO. Be available to staff for case consultation, support, and problem resolution. Be sensitive to staff needs;
- Facilitate program staff meetings to be held at least once per month;
- Assure quality service by being knowledgeable of and enforcing rules, regulations, legal requirements, and maintaining records necessary for programming and accountability;



- Participate in Partnerships, both formal and informal, affecting Financial Management Program such as Prosperity Center, Area Agency on Aging/Home and Community Care Block Grant;
- Prepare Home and Community Care Block Grant and make yearly presentation to allocation committee panel;
- Process and update training standards for Money Management Division, including SFC® manual, policies and procedures for credit counseling and debt management program (DMP);
- Participate in the professional and/or community organizations, building relationships, identifying referrals, and providing appropriate visibility for Senior Financial Care®, and Credit Counseling/DMP Programs;
- Supervise the scheduling of the Financial Management Program counselors. Review files regularly for quality assurance;
- Assist in the development of Financial Management Program marketing and community awareness activities, including the coordination of and active participation in Financial Management Program public speaking engagements.
- For the Financial Management Program, oversee the preparation of monthly internal reports, compilation of statistics, and maintenance of necessary logs. Keep a running Client Complaint and Resolution log for the program. Assure timely follow-up of clients and adhere to policies and procedures relating to client file maintenance and documentation.
- Oversee the Consumer Choice Credit Report program;
- Assist in the preparation of the agency annual budget, funding applications for United Way, and Financial Management Program budgets for grant funding;
- Contribute to the effectiveness of the credit counseling profession by maintaining active interest in the field, consulting, and advocating for change;
- Travel in own vehicle, with reimbursement for mileage expense, to perform assigned duties;
- Maintain active professional competency by participating in training and workshops for professional growth in areas pertaining to duties, specifically Financial Counseling, Credit Counseling, Debt Management, Financial Management for Seniors, Bankruptcy Counseling, Leadership, Management, and others as appropriate;
- Maintain oversight of client management system including security roles, reports, and scheduling;
- Perform other duties as assigned by supervisor.

#### Education:

- Identify the community service requirements, both actual and anticipated, by active personal contact with potential and actual clients, creditors, lenders, housing organizations, other human service agencies, employers, etc;
- Assist in the development of strategic plans for the changing community and professional trends by designing and implementing progressive educational programs;
- Contribute to the effectiveness of the program by maintaining active interest in the field, consulting and advocating for change;
- Assist the program in marketing services to the community or others as directed;
- Meet regularly with the FPP President and CEO to discuss community needs, workload, marketing needs/issues, make suggestions for changes/new programs, etc., and to provide monthly statistical data;
- Provide financial literacy education on money management, credit, social work, and related



areas;

- Oversee maintenance of accurate computerized case files as defined by program guidelines;
- Conduct grant research, planning, writing and reporting to support the agency financial education services;
- Work closely with the agency Chief Development Office and Marketing Committee to develop and implement marketing goals. Identify community needs and requirements, both actual and anticipated, by active personal contact with potential and actual clients, creditors, other human service agencies, employers, and business associates to promote agency services, features, and benefits, to the public. Helps assure that FPP will have a high visibility in the community;
- Develop and provide and/or facilitate educational and marketing presentations to a wide variety of audiences including but not limited to employee groups, United Way agencies, community service organizations, and churches ensuring a well-rounded educational program.
- Work with the President/ CEO, Marketing and Resource Development Committee and Leadership Team to actively pursue on-going funding opportunities for Financial Education;
- Develop and utilize objective means to measure success, whether by customer surveys, increased services, or other methods to determine success of FPP Financial Education activities.
- Coordinate and/or participate in staffing of agency booth at United Way Fairs, Community Organization Fairs, and Employee Fairs;
- Prepare reports on education activities as required;
- Responsible for maintenance of counselor certifications and professional development units;
- Perform other duties as assigned by supervisor.

#### **Agency Responsibilities**

- Adhere to Agency policies and procedures, employee handbook;
- Assure confidentiality of information related to clients and other information of a confidential nature;
- Be sensitive to the needs and circumstances of the client and respect diversity among cultures, gender, age, etc;
- Promote a positive image of the program and agency by demonstrating an understanding of the services available and conducting oneself according to a professional code of ethics.
- Assist in furthering the mission of the organization;
- Maintain active professional competency by participating in training and workshops for professional growth in areas pertaining to responsibilities;
- Be a team player and maintain harmonious working relationships with agency staff, United Way, educators, business associates, customers, and other related service agencies by amenable and cooperative contacts.

**Equipment Used:** Telephone, copier, computer, MS Office

**Working Conditions:** General office environment

#### **Physical and Mental Requirements**

Frequent: sitting, walking, seeing, hearing, writing, reading, problem solving, planning, making decisions, organizing, interpreting data, supervising others

Often: standing, carrying, climbing, reaching, push/pull, driving, bending, lifting 20 lbs, squatting