United Way of Southeast Louisiana

JOB DESCRIPTION

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| Position Title: Senior Financial Education Specialist, Financial Capability |
| Reports to: Sr. Vice President, Financial Capability |
| Location: 2401 Canal Street, New Orleans, LA  | Division: Community Impact  |
| Classification: Exempt – **Salary $50,000** | Supervises: N/A  |
| General Functions: The Senior Financial Education Specialist will play a pivotal role in providing leadership and strategic direction to the Financial Literacy program. This position operates under the direct supervision of the Senior Vice President of Financial Capability and is responsible for ensuring the successful implementation of financial education initiatives for all eligible clients. |

**CORE COMPETENCIES for ALL UNITED WAY PROFESSIONALS:**

* **Mission-focused** – top priority is to create real social change that leads to better lives and healthier communities.
* **Relationship-oriented** – understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
* **Collaborator** – understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
* **Results-driven** – dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
* **Brand Steward** – understands their role in growing and protecting the reputation and results of the greater network.

**ESSENTIAL FUNCTIONS:**

1. **Program Leadership:**
* Provide visionary leadership to the Financial Literacy program, aligning strategies with organizational goals and the evolving landscape of financial education.
* Collaborate with the Senior Vice President to develop and implement programmatic goals, ensuring alignment with the organization's mission and objectives.
1. **Team Management:**
* Train, support, and supervise Financial Literacy staff, fostering a collaborative and results-driven team environment.
* Conduct regular performance assessments, identify professional development opportunities, and ensure staff members are equipped to deliver high-quality financial education. Create educational materials to support financial literacy initiatives, including guides, worksheets, and online resources.
* Stay updated on financial trends and regulations to provide accurate and current information.
1. **Curriculum Development:**
* Design, develop, and update comprehensive financial education curricula that cater to clients' diverse needs.
* Stay abreast of industry trends, educational best practices, and emerging financial topics to inform curriculum development.
1. **Program Implementation:**
* Ensure the seamless integration of financial education initiatives into the organization's services, maintaining a client-focused approach.
* Regularly assess program effectiveness and make data-driven recommendations for program improvements.
1. **Adaptability and Innovation:**
* Pivot existing programming to meet emerging client needs and stay ahead of changes in the financial landscape.
* Collaborate with internal and external stakeholders to identify opportunities for innovation and improvement in financial education delivery.
1. **Grant Monitoring:**
* Monitor the progress of grants related to financial education initiatives, ensuring compliance with grant requirements and reporting deadlines.
* Prepare comprehensive reports on grant progress for internal and external stakeholders.
1. **Collaboration:**
* Work collaboratively with cross-functional teams to integrate financial education into various organizational activities and services.
* Establish and maintain partnerships with external organizations to enhance the reach and impact of financial education programs.
1. **Communication and Advocacy:**
* Act as a key spokesperson for the Financial Education team, representing the organization in relevant forums and advocating for the importance of financial literacy.
1. **Data Analysis and Reporting:**
* Collect and analyze data on the impact and effectiveness of financial literacy programs.
* Prepare regular reports for stakeholders, showcasing outcomes and areas for improvement.
1. **Professional Development:**
* Stay informed about changes in the financial industry, regulations, and educational best practices.
* Attend conferences, workshops, and training sessions to enhance financial knowledge and instructional skills.
1. **Cultural Competency:**
* Demonstrate cultural sensitivity and an understanding of diverse populations, ensuring services are inclusive and accessible to all.
1. **Travel:**
* Develop a weekly schedule and travel to assigned parishes to engage with families and provide support.
1. **Other Responsibilities:**
* Perform other work-related duties as assigned.

**JOB QUALIFICATIONS:**

1. Bachelor's degree in finance, economics, education, or a related field.
2. Proven experience in developing and delivering financial education programs.
3. Strong organizational skills and meticulous attention to detail.
4. Excellent written and verbal communication skills, including proper telephone etiquette.
5. Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and basic office software.
6. Ability to work effectively both independently and collaboratively within a team.
7. Passion for community service and a deep commitment to the United Way's mission.
8. Self-motivated, quick study, and able to work effectively with minimal supervision.
9. Strong interpersonal skills with the ability to initiate, build, and continuously strengthen partnerships with a diverse population.
10. Must maintain a valid driver’s license, minimum insurance, and reliable transportation.
11. Ability to adapt to changing circumstances and cognitively respond appropriately and with discretion.
12. Demonstrated ability to use sound judgment to handle/resolve details and matters not requiring the personal attention of the supervisor.
13. Unquestioned confidentiality with sensitive financial and personnel matters and issues
14. Must be available to work a regular Monday-Friday work week with occasional early morning, evening, and weekend availability as needed.
15. Have no outside business interests that may conflict with the organization's goals and objectives and not explicitly approved by the President/CEO

Signed Senior Financial Education: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

Signed Sr. Vice President, Financial Capability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

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