



Job Description

Job Title: Financial Education Program Lead (part time 30 hrs)
Program: Financial Education Program
Reports To: Programs Director
Date Prepared: June 2010

SUMMARY:

Over its 37 year history, the Mission Economic Development Agency (MEDA) (www.medasf.org) has advanced innovative approaches to promote economic justice through asset development for the Latino community in San Francisco. Its programs foster asset creation through group education and one on one counseling in financial literacy, small business development, homeownership, and community planning.

The mission of MEDAs’ Financial Education Program is to promote asset development and increase community sustainability through relevant financial education that is culturally appropriate for its constituency. The program assists low- and moderate- income San Francisco households, focusing predominantly on the Latino community, to successfully achieve a higher level of knowledge that is key to personal financial success. This is accomplished by providing group workshops and one on one consultations. Action plans are established with each client to support their goals of homeownership, business development, or personal financial growth. All program services are provided in English and Spanish.

The Financial Education Program Lead is the “face” of the program, and provides the analysis and messaging for the program. It is responsible for ensuring program curriculum is the most relevant and culturally appropriate for MEDA’s constituency. It also ensures that client processes, systems and mechanisms are implemented by all program staff. It also plays a key role in forming program related collaborations.

DUTIES AND RESPONSIBILITIES:

Program Integration	Under the supervision of the Programs Director, works with program staff to implement tools, mechanisms and processes within the Financial Education Program to guarantee the highest level of coordination and integration of MEDAs’ other direct service programs.
Program Development	Under the supervision of the Programs Director, Program Leads will coordinate program and curriculum development for their particular program area to ensure that direct services provided are most current, relevant and culturally appropriate for MEDA’s constituents.

Provision of Direct Services	The Program Lead will maintain a reduced client load, which is about 40% of the client load for a consultant. Provides one-on-one consulting services and facilitates workshops. Follows-up with clients on an ongoing basis to track impact of services provided. Makes referrals to relevant services, as needed.
Program Evaluation	Assists in establishing program goals and outcomes, provides quality control on program analysis, and assists in implementing next steps as needed.
Program Reporting	In collaboration with fund development staff, the Program Lead will write the analysis based on the data generated by the Programs Coordinator. This analysis will be shared with fund development staff for the preparation of funder reports.
Program Administration	Provides feedback to Programs Director on administrative needs to support program goals. Creates and monitors program and consultant work plans to meet various programmatic and funding requirements. Develops program workshops schedule mindful of other MEDA programs and Plaza Adelante tenant's workshops schedules. Ensures client workload is evenly distributed among consultants considering overall program workload. Prepares and maintains client files according to all program guidelines.
Human Resources	Under the supervision of the Programs Director, Program Leads will support staff through work plan development, assists with staff evaluations, and identifies appropriate professional development opportunities. Works in consistency with MEDA's policies and procedures. Completes yearly self-evaluation.
Fund Development	Work collaboratively with the fund development staff in providing the analysis and messaging for funder reports, and assists with any fundraising and grant writing efforts, as needed.
Budget and Fiscal Oversight	Under the supervision of Programs Director, the Program Lead assists in the development and monitoring of individual program budgets. Prepares and submits invoices/billings to funders for services provided.
Collaboration	The Program Lead manages program-specific partnerships with various stakeholders including representatives of local government, financial institutions, and community groups.
Marketing and Outreach	In collaboration with the Marketing Coordinator, leads in the coordination of program-specific marketing and outreach strategies and messaging. Leads in the promotion and representation of the program through participation in sector forums, meetings and networks.
Special Projects	Co-manages with the Marketing/Events Coordinator, the successful planning of program-specific events, such as the homeownership fair. Participates in the implementation of MEDA's annual event.

QUALIFICATIONS:

- Experience with program development, including curriculum development.
- Two years previous experience in financial education, mortgage lending and/or housing counseling field required.
- Excellent quantitative and financial analysis skills.
- Excellent written, verbal and presentation skills.
- Experience and/or desire to work with diverse populations.
- Familiarity with San Francisco's political environment, preferred.
- Spanish fluency, required.
- Bachelor's degree in business, finance, economics or other related field preferred or equivalent experience.

CONTACT:

Please note this is a part time position at this time. 30 hours per week

Send resume and cover letter to:

Email: rsafont@medasf.org

Fax: (415)282-3320