



JOB DESCRIPTION

July 2, 2020

POSITION: Financial Literacy Assistant (FLA)

REPORTS TO: Financial Literacy Manager (FLM)

LEVEL/STATUS: Part-Time, Non-Exempt
(Approximately 10-12 hours per week)

SUPERVISES: N/A

SALARY: TBD

PURPOSE: *Birch Community Services, Inc. (BCS) seeks to provide a community where people can be responsible and accountable for meeting their basic needs and to equip them with tools to overcome financial difficulty. The successful FL Assistant candidate will give support to all curriculum-based BCS training (excluding training of warehouse volunteers and employees). He/she will help coordinate the recruitment, screening, training, and evaluation of BCS course instructors. He will also assist in the management and tracking the progress of each family. The FLA will also assist in scheduling, follow up and support the systems for tracking and reporting on the outputs related to BCS training and program impact on families.*

KEY RESPONSIBILITIES:

ADMINISTRATIVE (70%)

Objective: *In cooperation with the FL Manager the FLA will support all activities related to family meetings, schedule and information management. Gather "story-based intel" gleaned from factors inside and outside of BCS which will be used to help families learn to better manage their resources and to assist BCS in improving our programs and developing new ones.*

Responsibilities:

- Review participant financial information to ensure accuracy and goals with SF
- Maintain confidentiality and respect for each family
- Send follow-up communication for tracking and accountability
- Assist with quarterly board reports on the findings and outcomes associated with family meetings

EDUCATION HOST (20%)

Objective: *In cooperation with the FLM the FLA will support best-in-class curriculum for courses designed to fulfill BCS's stated mission. The FLA is responsible for pre-planning through delivery of BCS training programs, assisting all class curricula development, logistics, scheduling and delivery.*

Responsibilities:

- Send out teaching schedules to staff, volunteers, and interns
- Update the education class calendar in Microsoft Outlook/Shared Docs

- Prepare materials for our education classes
- Electronically record all garden class activities
- Maintain a safe and organized work environment
- Maintain clear and open communication with BCS staff and volunteers
- Interact with participants and volunteers in an enthusiastic and friendly manner
- Host each of the finance classes (in person or online), and potentially any class held on site

OTHER (10%)

Responsibilities:

- Assist the FLM with program outcomes
- Special projects and other duties as assigned
- Monitor and evaluate program effectiveness and the exit questionnaire process
- Assist with office tasks and other duties as requested

QUALIFICATIONS:

Requirements

- **Be personally cognitive of and implementing wise financial management**
- Understand, embrace and exhibit the BCS Cultural Values and Principles
- Be positive, flexible, and self-directed
- Familiarity using computers and the internet
- Ability to sit at a desk and work in a shared office space
- Must have excellent communication skills
- Open to, and interested in, learning new computer programs (Microsoft Word, Excel, Outlook, OneDrive, Salesforce)

Preferences

- Experience with developing statistical reports
- Knowledge of case management and/or volunteer management best practices

NOTES:

Currently, much of the above can be completed off-site, with the understanding this could change at any time.

To apply, please email resume and cover letter to Dino@bcsi.org. Please, no phone calls.