

## **JOB ANNOUNCEMENT**

Title:	<b>Financial Capability Manager</b>
Department:	Asset Building Programs
Supervised by:	Tax Site Manager
Duration & Hours:	January 20 to April 16 (with training dates in Dec and Jan) Hours and days will vary by tax site
Locations:	Aurora, Elgin
Classification:	Seasonal; temporary
Date:	December

## **ORGANIZATIONAL SUMMARY:**

The Center for Economic Progress (CEP) envisions an America of shared prosperity, where all working families can access the financial opportunities they need to succeed. CEP helps low--- income, working families as a trusted provider of tax and financial services. Everything we do, from direct service to informing public policy, improves the financial stability of those we serve. Refer to [www.economicprogress.org](http://www.economicprogress.org) for more information about CEP's programs.

## **SUMMARY:**

The Center for Economic Progress operates 15 tax sites across the Chicagoland area to provide free tax preparation services to low-income working individuals and families. The Tax Time Financial Capability program supplements this work by providing financial services and products at the tax site. The Financial Capability Manager (FCM) will support CEP's efforts to promote financial capability at the tax site. Each FCM will be responsible for the operational success of one of the participating community tax sites.

## **RESPONSIBILITIES**

Promotion and Outreach

40%

- Provide enthusiastic outreach and education to all taxpayers engaging them around the importance of saving towards specific financial goals and wise money management practices using marketing and outreach language and materials
- Motivate taxpayers to commit to saving a part of their refund by signing them up to participate in the Savings Campaign. Manage and oversee the Savings Campaign station ensuring that the space is efficiently and effectively being used to reach all tax filers

### Operations

30%

- Work closely with site management staff at each community tax site to ensure effective and smooth operations at each location
- Maintain an orderly and neat work area
- Ensure that all Savings Campaign sites are stocked with necessary campaign materials and tools for successful promotion of savings
- Ensure all prepaid card enrollments run smoothly and effectively
- Work closely with bank partners at each location to ensure efficient account opening and data collection, when necessary
- Help tax site staff and volunteers make effective referrals to our Financial Coaching program
- Ensure that program activities operate within CEP's policies and procedures

### Volunteer Management

20%

- Provide positive and professional experience for all volunteers and financial services partners by providing ongoing recognition and support
- Delegate responsibilities and tasks to volunteers based on site needs and volunteer roles, interests, and abilities

### Data Collection

10%

- Ensure the collection and maintenance of accurate data for savers for evaluation purposes in accordance with confidentiality/privacy policies
- Regularly monitor the progress of savers at each tax site to ensure that we meet or exceed all of our savings targets

## **QUALIFICATIONS**

Job Experience: 1 year of work experience in the nonprofit, marketing, or sales fields. Experience in sales, marketing, outreach, or performance arts a plus

### Requirements:

- Excellent public speaking and presentation skills
- Excellent verbal and written communication skills with exceptional attention to detail
- Personal qualities of integrity, credibility, and a commitment to and a passion for CEP's mission
- Bilingual Spanish/English a plus

### Demonstrated Competencies:

- Ability to energize and motivate people
- Proven team leader/player; displays strong leadership attributes
- Customer focused – ability to anticipate, understand, and respond to the needs of internal and external clients
- Ability to work independently
- Confident decision maker; proven problem solver
- Understanding of ethical behavior and sound business practices
- Effective communicator -- ability to speak, listen and write in a clear, thorough and timely manner
- Familiarity with Chicago communities helpful

## **WORK ENVIRONMENT**

- This position operates in partner host-site locations that may not necessarily be fully accessible.
- This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets, and fax machines.
- While performing the duties of this job, the employee is regularly required to talk or hear.

- The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms. The employee must frequently lift and/or move objects up to 50 pounds.
- This position will require working weekends and evenings.
- Regular travel to off-site locations in the Chicago metro area is required. Occasionally, some out-of-the-area travel may be expected.
- Workplace is a smoke- and drug-free environment.
- Decisions and criteria governing the employment relationship with all employees are made in a non- discriminatory manner, without regard to race, ethnicity, creed, religion, color, sex, sexual orientation, gender identity or expression, age, national origin, citizenship status, military service and/or marital status, order of protection status, handicap, disability, or any other factor determined to be unlawful by federal, state, or local statutes.

All Site staff are required to attend and complete training as determined by CEP, and to successfully complete IRS' certification exam.

## **COMPENSATION**

- Hourly pay ranges from \$14-\$16, commensurate with experience.
- Payroll is operated through Randstad Inc.

## **TO APPLY**

- Submit cover letter and resume to Udodi Okoh, [uokoh@economicprogress.org](mailto:uokoh@economicprogress.org)
- Please write your name (Last, First) in the re: line of your e---mail.
- Incomplete applications will not be accepted.
- Candidates will be considered immediately and the position begins in early January.