Job Description

Financial Empowerment Supervisor
Financial Empowerment Program

GENERAL DESCRIPTION:
The Financial Empowerment Supervisor will direct and coordinate the activities of the Financial Empowerment Santa Clara County Loan Coordinator, as well as the Loan Processor and Business Development Officer (future positions). Additionally, under limited supervision, this position will be responsible for efficiently performing all tasks involved in the daily operation of the Ways to Work Vehicle Loan, the Lending Circles, Start2Save and VISA Prepaid Debit Card Programs. Supporting community outreach activities and referring other financial services to our participants will also be required. The Financial Empowerment Supervisor will work at both of the San Mateo and San Jose offices, depending upon workload and staffing needs at each location. On-going participant case management and delivering financial workshops are also important components of this position. This is a professional position which interfaces with the public, and program partners such as financial institutions, employers, the national Ways to Work organization, funders and other community based non-profit organizations.

JOB CLASSIFICATION: Exempt

REPORTS TO: Director, Financial Empowerment Program

QUALIFICATIONS:
Required:
1. Bilingual in English/Spanish.
2. Some college background.
3. Some financial services industry background.
4. Ability to effectively supervise individuals with varying skill sets in a high volume, case management intensive environment.
5. Ability to deliver informative financial workshops with strong instructional skills.
6. Highly self-motivated and self-directed, and must demonstrate non-judgmental professional decision-making.
7. Strong organizational skills with critical attention to detail.
8. Must be able to work independently in an environment of constant change and high volume.
9. Ability to independently research and develop community contacts.
10. Effective oral and written communication skills required, including public speaking.
11. Ability to perform participant case management duties in a supportive, yet detailed manner.
12. Effective computer skills.
13. Must be able to problem solve with strong research abilities to locate options and/or potential solutions to various challenges and opportunities.
14. Must be flexible and a team player.
15. Commitment to the organization’s and program’s mission and purpose.
16. Must exhibit maturity, good judgment, dependability, and accuracy.
17. Must maintain professional behavior and image.
18. Ability to work effectively under minimal supervision.

Preferred:
1. Undergraduate degree in Business or related field preferred.
2. Two years of experience in the banking or financial services field is highly desirable. Experience would include the ability to perform a variety of tasks including consumer lending, managing delinquencies, portfolio management and office/administrative duties requiring the use of discretion and judgment.
3. Two years of experience working with low income families and diverse populations facing financial barriers.
4. Two years of experience in delivery of financial empowerment services.
DUTIES & RESPONSIBILITIES:
1. Effectively supervise and coordinate the activities of Financial Empowerment staff, which will include working at both our San Mateo and San Jose offices.
2. Deliver financial education workshops.
3. Assist in the attainment of monthly and annual goals of all Financial Empowerment Programs.
4. Work with participants to assess their qualification for all Financial Empowerment services.
5. Process loan inquiries and applications.
6. Coordinate and present applications at periodic Loan Committee meetings.
7. Independently research and develop community contacts. Goal is to expand the awareness (and utilization) of our Financial Empowerment programs to the employees and customers/participants of a variety of community organizations.
8. Research and recommend dealerships, inspection garages and insurance companies to assist approved Ways to Work Vehicle Loan Program participants in the location, inspection and insurance of a new vehicle (for both counties).
9. Effectively refer participants to other financial products and services as applicable to each participant’s situation.
10. Maintain program database with accurate and timely input of data.
11. Perform collection and recovery activities under the direction of the Program Director.
12. Facilitate loan closings.
13. Prepare delinquency, payoff and loan commitment letters.
14. Conduct participant outcome surveys, as well as generate reports compiling this data.
15. Periodically review program processes and procedures and make recommendations for improving service to participants and program efficiencies.
16. Participate in marketing initiatives through various media channels.
17. Adhere to all Peninsula Family Service policies and procedures, as well as any legal requirements impacting any of our programs.
18. Must respect the confidentiality of all participants.
19. Other duties as assigned by supervisor.

PUBLIC RELATIONS:
Represent the Financial Empowerment Program in a positive and professional manner in the community and within the organization.

PERSONAL:
1. Obtain fingerprint clearance before first day of employment (and maintain).
2. Verification to legally work in the US before first day of employment (and maintain).
3. Ability to get to off-site locations for job and business related activities.
4. Ability to work some evenings and weekends.
5. Some overtime required.
6. Driving a personal car on Peninsula Family Service business requires an appropriate level of insurance and must be cleared to drive through Peninsula Family Service’s insurance carrier. (HR will identify appropriate level of insurance and will clear driver through Peninsula Family Service insurance carrier.)

Effective Date: October 29, 2015
Revision: January 29, 2016