



MONTANA'S CREDIT UNIONS

Educate. Advocate. Collaborate.

POSITION: **COMMUNITY DEVELOPMENT MANAGER**
COMPANY: Montana Credit Unions for Community Development
IMMEDIATE SUPERVISOR: VP - Advocacy
DATE REVISED: July 2017
APPROVED: July 26, 2017

BASIC FUNCTIONS:

This position is responsible for managing the activities and initiatives for MCUCD's asset building programs and services, including Matched Savings Accounts, Financial Capability, and other MCUCD programs and services as assigned.

ORGANIZATION:

Position to which supervisor reports: President/Chief Executive Officer
Immediate supervisor: MCUN VP - Advocacy
Other positions reporting to same supervisor: Director Political Advocacy
Membership Data Manager
Personnel supervised:

DIMENSIONS:

Category of employment: Exempt

PRINCIPAL ACCOUNTABILITIES:

The Community Development Manager is responsible for the management and coordination of MCUCD's asset building programs and services. Responsibilities include, but are not limited to the following:

MATCHED EDUCATION SAVINGS ACCOUNTS (MESA) - Serve as project manager for the MCUCD MESA programs:

1. Support MESA partner relationships, manage outreach and marketing for programs, train credit union and partner staff on roles and responsibilities, ensure partners and credit unions are fulfilling program obligations and meeting participant needs.

2. Manage MESA application, enrollment and withdrawal processes for MESA applicants/participants. Maintain appropriate and regular communication with applicants/participants. Ensure participants are meeting program requirements, collect and record monthly activity, perform ongoing monitoring and reporting of each program.
3. Maintain current database ensuring all information is up-to-date, producing regular program reports for grantor, partners and credit unions.
4. Identify and build relationships with partner credit unions, local colleges/universities, community organizations, and government agencies that serve the target population; determine (and utilize) how these groups can help in the goal of the MESA program.

FINANCIAL CAPABILITY - Coordinate and manage financial education initiatives with Montana's credit unions:

1. Promote and support financial capability programs delivered to credit union employees, members and community partners and schools. Initiatives include:
 - a. Momentum on Up (MOU): earn certification for MOU program, promote to credit unions and partner organizations, coordinate and deliver education sessions.
 - b. Reality Fairs: promote program to member credit unions and partner organizations, assist in coordination of fairs, maintain and update Reality Fair Toolkit.
 - c. Financial Counseling and Coaching: support credit unions by assisting in the distribution of resources, coordinating and conducting trainings, as well as collecting data and producing program reports.
5. Keep credit unions updated on outreach and financial/consumer education issues, trends, and new developments through appropriate avenues, including President's Report, direct mailings, presentations, webinars, and/or website articles.
6. Serve on the Financial Education Coalition Board of Directors on behalf of the Montana Credit Unions for Community Development.

OTHER:

1. Provide "train the trainer" sessions as needed for credit union staff and partner organizations wanting to be actively involved in asset building and financial education.
2. Support MCUCD fundraising efforts. May include coordinating special events throughout the year.
3. Develop and maintain positive relations with all credit union and partner organizations. Work with credit unions and partners to generate a sense of ownership and empowerment to emphasize the credit union difference of the asset building programs.
4. Support and promote the credit union difference.
5. Other duties as assigned or approved by immediate supervisor.

REQUIREMENTS:

Requirements for this position include a wide variety of qualifications and skills, encompassing but not limited to the following:

- Education requirement: Equivalent to a college degree.
- General skills needed for this position include: Highly organized, keen attention to detail, persistent and follow through consistently; Teaching/training experience; Excellent written and verbal skills;
- Interpersonal/personal skills and abilities include: Ability to work well with all types of personalities and interact effectively with staff and students, providing guidance and information; and comfortable working independently and cooperatively with others.
- The ability to motivate or influence others is a material part of the job, requiring a significant level of diplomacy and trust. Obtaining cooperation, internally and externally, is an important part of the job.
- Minimum physical requirements include: Sitting for extended periods of time; telephone interaction; extensive reading; some travel away from the office, in automobiles and commercial airlines; and the ability to use computer systems (repetitive motion).
- Familiarity and experience with college access and financial aid is preferred.