

Financial Information Education Manager - Job Standards

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

KNOWLEDGE OF WORK:

- Has considerable knowledge about various aspects and components of consumer finance (i.e., borrowing, saving, investing, leasing, home ownership, tax implications) and how to develop and present consumer finance information to others—individually, in groups, and in training classes.
- Understands the mission, culture, general operating functions and “consumer education” objectives of the organization, and the types of educational initiatives that align with, support and promote increased consumer awareness and knowledge about consumer finance.
- Knows how to conduct consumer finance “needs assessments” to determine training and educational needs and identifies which needs are not being met by other institutions and organizations, or which could be better met through the efforts of this department.

QUALITY OF WORK:

- Maintains a complete and accurate record of education and training activities – daily, weekly, monthly, by type, groups, attendance, guest presenters, locations, etc. – and submits reports of completed and scheduled sessions to management and other appropriate groups as required.
- Personally prepares training programs on consumer financial information – behavioral objectives, methodology, handout materials, visual aids, etc. – and presents training seminars to appropriate groups.
- Creates consumer information booklets for distribution to seminar participants and general distribution to customers and general community individuals and interest groups.
- Ensures that consumer information provided is correct in all respects by consulting with, and obtaining correct information from experts on appropriate topics before delivering the session.

QUANTITY OF WORK:

- Invests time and effort in becoming informed about new consumer finance issues and opportunities, as well as consumer protection issues that might have been uncovered by law enforcement agencies, litigation, or other experiences. Develops awareness building and educational initiatives to address such issues.
- Develops a pro-active approach to consumer financial education. Plans each day’s activities to ensure maximum productivity, the greatest coverage of topics and delivery events, and significant visibility within the general community as a consumer advocate.
- Ensures that the training schedule is maintained, sufficient participants are enrolled, and events are delivered as scheduled and promised, with close attention to positive logistical and other meeting plan details.

COOPERATION/RELATIONSHIPS:

- Contributes to working conditions and the work environment in ways that promote harmony and sound interpersonal working relationships.
- Takes a balance approach when addressing organization and/or people issues to ensure fair and equitable recognition and response.
- Works positively to create teamwork and harmony among all units and individual employees.