

# Appendix I:

## Sample Job Description

The following is an example of a job description for the program coordinator function at an AFI Project. Staffing configurations and staff roles and responsibilities vary from organization to organization, and they reflect specific project design. For example, some positions will entail far less individualized support for clients; or partnering organizations may manage day-to-day participant activities while the coordinator has oversight of more central functions and receives reports from partners. (*Note: On these sample forms, the term “AFI Project” refers to the grantee or its IDA initiative. You probably will want to replace that term with the grantee organization’s name and/or the name of its IDA initiative.*)

### Position: IDA Program Coordinator

Full-time position responsible for coordinating the **AFI Project’s** Individual Development Account (IDA) and Economic Education programs. Reports to Director.

#### Duties and Responsibilities

1. Maintain and improve the daily operations of the **AFI Project’s** Economic Education initiative, including the Individual Development Account (IDA) program. Meet or exceed required program goals and outcomes.
2. Coordinate and maintain all record keeping and financial tracking for the individual IDA accountholders using AFI information system software. Process ongoing client statements on schedule. Maintain relationship with project bank partner(s).
3. Coordinate all **AFI Project** information sessions, training classes, and follow-up session logistics, including: scheduling, guest speakers, facilities, materials, promotion, confirmations, tracking, evaluation, and follow-up. Facilitate/teach all sessions, training classes, and monthly Savings Club meetings.
4. Work one-on-one with current and future economic education participants and IDA accountholders. Meet at least twice annually and talk quarterly. Assist participants in opening/maintaining agreements and accounts. Develop strategies to encourage participants to save regularly. Provide help with classroom homework or missed sessions.
5. Develop and implement regular outreach and program promotion, including: news releases, flyers, media coverage, telemarketing, correspondence, etc.
6. Complete all required funder reports accurately and on time. Provide president with program materials, status, and outcomes as requested.
7. Develop, improve, and maintain a policy program manual program and insure that all staff involved are knowledgeable about current policies and procedures.
8. Assist in overall mission of the **AFI Project** by working in a team environment to effectively complete other duties as assigned.

#### Qualifications

Minimum of two to three years’ experience in economic development, credit/financial education, or program coordination. High school degree required; bachelor’s degree preferred. Must be detail-oriented and possess strong organizational, verbal, and written communication skills. The capacity to function in a fast-paced, growing organization is vital. The ideal person is flexible and positive and has a sense of humor. Demonstrated ability to communicate effectively and work collaboratively with diverse audiences is necessary.