

Financial Literacy Intern



Financial Literacy Intern

Reports to: OneCal SAFE Program Manager

Classification: Intern

Compensation: Stipend \$100/week

Availability: 6 week internship – June/July 2010

Work Hours: 4 days per week, 9:30-5pm

Organizational Description

OneCalifornia Foundation is a charitable and educational nonprofit corporation that supports programs and initiatives promoting community development in the Bay Area and California. Included in these activities are programs dedicated to creating and sustaining economic development; such as support for small businesses, financial literacy, banking services for low-income communities, and advocacy. OneCalifornia Foundation also works to promote the creation and sustainability of affordable housing and homeownership for low income families and individuals. The Foundation is associated with the OneCalifornia Bank, a Community Development Bank, based in Oakland, CA.

Position Overview

OneCalifornia's programs are intended to help people, especially those in low-income communities, to save, keep and manage their money, by providing them with access to banking services that are fairly priced and clearly explained.

We are seeking a motivated individual to work at our foundation for 6 weeks, as we grow rapidly in our third year of operation. The Financial Literacy Intern will work closely with the manager / instructor of the OneCal SAFE program to expand, assess, and make improvements to the foundation's financial literacy program – OneCal SAFE.

All OneCalifornia Foundation summer 2010 interns will also participate in a Community and Socially Responsible Banking and Business curriculum, which consists of a weekly series of 5 workshops, led by experts in the fields of banking, community banking, investing, and finance. Workshops may also include field trips to relevant institutions to meet experts and see the work in action. These workshops will take place within the intern's normal work week, as described above.



Primary Duties and Responsibilities

- Contact current OneCAL SAFE community partners
 - Provide them with current program information
 - Confirm best contact person within the organization, and their current information
 - Potentially survey them about their perceptions and usage of the program
- Review existing relationships with OneCAL SAFE community partners, evaluate the successes and failures. Make recommendations to improve contact and communication with existing partners.
- Recruit new participants in the program through community partners
 - Characteristics of good partner organizations
 - Communication methods and frequency for contacting partners
 - Information we should provide to partners to motivate them
- Successes
- Relevant financial literacy topics (valuable content)
- Evaluate non-partner ways that we have received participants and any ideas for ways to recruit new participants
 - Identify and create handouts or other financial education deliverables that would be most useful, interesting, and motivational to help former participants maintain the good saving and personal financial habits covered in the workshop
 - Assist in creating an alumni program that will offer continuous financial education content to past participants
 - Set-up an alumni email contact group
 - Research and compose financial education articles that will be featured in a (bi)monthly emailed newsletter to the alumni program
 - Evaluate and list current sources (local organizations, individuals, websites, other written material) to provide ongoing content for financial literacy workshop participants
 - Organize database to track OneCAL SAFE participants
 - Research and propose cost effective financial education promo products
 - Assist in developing OneCAL SAFE Business Financial Literacy Workshop
 - Participant in Community Banking Curriculum Classes and Field Trips

Final Deliverable(s) at the End of the Internship

The Financial Literacy Intern will provide the following deliverables at the end of his/her internship:

- Updated Partner Contact List Spreadsheet with
 - New contact information for existing organizations
 - Notes or survey question answers about the program
 - List of new organizations to approach as new potential community partners
 - Call log information (who contacted when)
- Updated OneCAL SAFE participants database



- Structure of Alumni Program
 - Email group list
 - 10 – 12 financial education articles to be included in email newsletter

- 2-5 page document describing
 - The successes and failures of the community partner referral program
 - Recommendations for recruiting new participants in the program through community partners
 - Other (non-partner) ways that we have received participants and any ideas for ways to recruit new participants

Qualifications, Skills and Abilities

- Junior or Senior enrolled in a bachelor’s degree program or at an accredited 4-year college or university; business, finance, related majors, or 1st-year MBA student.
- Solid computer and spreadsheet skills, including Microsoft Word, Excel, Outlook, Access, and PowerPoint required.
- Friendly personality, with excellent phone skills and willingness to call new organizations
- Experience with internet research to provide information for presentations, projects, and programs.
- Demonstrates the ability to read, comprehend and explain complex information.
- Good logical thinker.
- Excellent written, organizational, and communication skills.
- Capacity to work effectively in a fast paced environment, as part of a team or independently.
- Tact, diplomacy, good judgment, discretion and ability to make sound decisions.
- Detail oriented, accurate and timely with assigned tasks.
- Self-motivated and possesses a drive to produce quality work
- Capacity to take initiative, consult, share information and ask questions within the Foundation and with other organizations when needed.
- Flexibility and ability to work on new and varied tasks, as needed
- Have a true “customer service” attitude.
- Curiosity about, interest in, or passion for community development
- Curiosity about, interest in, or passion for banking or finance
- Great sense of humor a plus
- Fluency in Spanish a plus

How to Apply

To apply for an internship position, complete the online form at <http://onecalfoundation.org/intern> .

Thank you for your interest in OneCalifornia Foundation and Bank. Please direct internship questions to Alan Fox at foxsrch@pacbell.net.