

Sue Rogan

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SUMMARY:

Accomplished Financial/Consumer Educator experienced in developing and implementing outreach programs to educate a diverse public; communicates with the media, community groups, businesses, as well as the general public; organizes coalitions to address current social issues. Effective trainer and skilled in public presentations.

EXPERIENCE:

July 2012—Present

MD CASH Campaign, Baltimore, MD

Director of Financial Education:

- Responsible for the operations of all financial education programs including MD CASH Academy, Financial Coaching program, fee based programs and Financial Education for two federal grant projects serving targeted populations of youth with disabilities and those who have been long term unemployed.
- Managing staff to recruit, train and manage volunteer Educators and Coaches, create curriculum and evaluation methods, development and management of an incentive program “Passport to Prosperity” and other marketing/outreach methods.
- Work with local organizations to implement financial education programs into their services. Interface on a regular basis with a wide variety of stakeholders including government officials, elected officials, non-profit management and the media.
- Assist local coalitions in developing their financial education programs
- Develop and conduct staff training for various non-profits, state or local agencies
- Conduct one on one Financial Coaching for clients
- Present on our programs and data at forums, conferences and statewide meetings.
- Serve as staff to Maryland’s Financial Education and Capability Commission

2009—July 2012

Financial Educator/Communications Consultant

Clients:

Senior Consultant, MD CASH (Creating Assets, Savings and Hope) Campaign

- Implemented a statewide program, MD CASH Academy, to provide educators and individuals a coordinated online calendar and registration tool to promote, provide and locate free, fact based financial education classes. Focusing on providing in-depth work in Montgomery County
- Developed partnerships with community agencies/non-profits/businesses to build community capacity to increase the financial stability of its residents. Provided Train the Trainer programs, guidance on programs/products to assist clients and direct assistance to clients as needed
- Trained Financial Educators to insure the quality of content and instruction
- Conducted Financial Education Classes, along with group and one-on-one financial coaching

Montgomery County Government

- Managed a emergency response call center including obtaining adequate coverage from both county staff and volunteers, creating communication methods to ensure consistent messaging, data reports and coordinating the transition/termination of the center

AFSA (American Financial Services Association) Education Foundation

- Provided teacher training on the financial education program offered by AFSA

University of Maryland, Extension Service

- Developed a comprehensive outreach campaign to promote their financial education program “Reading Makes Sense”

1990 – 2009

Montgomery County Office of Consumer Protection (OCP) - Rockville, MD

Communications Manager/Investigator:

- Responsible for the planning and implementation of multi faceted consumer education programs that include media communications, outreach to consumers, educational campaigns and electronic public communications
- Managed community outreach, resulted in opportunities for OCP to address a diverse public at events such as classes, seminars, large public events and fairs
- Produced written communications such as Annual Reports, brochures, fliers, press releases, emails, letters to community associations and newsletter articles
- Served as media liaison, issuing press releases, coordinating press conferences, performing media interviews including regular radio and television shows
- Built and coordinated coalitions of government agencies, non-profit organizations and businesses to address consumer issues
- Coordinated with state and local governments to conduct outreach campaigns
- Investigated individual complaints, conducted major investigations, issued subpoenas, civil citations
- Conducted research, prepared reports and wrote testimony on OCP's position on consumer issues

1988–1990

Council of Better Business Bureaus – Arlington, VA

• **Senior Account Executive/Policy Analyst:**

- Responsible for analyzing and communicating all policies and procedures of the Auto Line Program, making decisions on any questions on these policies and procedures,
- Contributed to the certification process for BBB offices to administer the California Lemon Law, and trained staff on the procedures Co-responsible on a nationwide basis for the drafting of all arbitration agreements concerning leased vehicles

1988

Mediation/Arbitration Specialist:

- Responsible for all aspects of individual cases involving disputes between participating automobile manufacturers and consumers including intake, investigation, drafting legally binding arbitration agreements

1986 – 1988

AAA Potomac – Arlington, VA

▪ **Customer Service Representative:**

- Investigated, negotiated and resolved customer complaints involving service, policies or procedures
Prepared management reports

1982 – 1983 **Attorney General's Office, Consumer Protection Division- Salisbury, MD**

▪ **Consumer Specialist:**

- Investigated, mediated and resolved consumer complaints through use of written correspondence, telephone calls or on-site visits to the involved companies

EDUCATION:

University of Maryland Baltimore County—Catonsville, MD
BA in Political Science

CERTIFICATIONS:

ACCREDITED FINANCIAL COUNSELOR® via the AFCPE accredited program

BOARD MEMBERSHIPS:

Current: Consumer Action; Howard County Office of Consumer Affairs Advisory Committee, Safe Kids
Montgomery County MD

Previous: Maryland Coalition for Financial Literacy, Maryland Higher Education Commission's Secretary's Advisory Council, Maryland Consumer Rights Coalition, GROWS (Grass Root Organization for the Wellness of Seniors)