



Hampton Roads Community Action Program

2410 Wickham Avenue
P.O. Box 37
Newport News, VA 23607

JOB DESCRIPTION

Financial Literacy Coach

PURPOSE OF POSITION:

The Financial Literacy Coach position offers a unique opportunity for a highly motivated individual to work in a growth-oriented program that is dedicated to helping low to moderate income families change financial behavior, build assets and become financially stable. The coach provides individualized financial coaching for participants to help them reach target goals including credit score; budgeting; saving; utilization of quality financial services; and asset development. The Financial Coach will work directly with Hampton Roads and Greater Peninsula families/individuals to ensure that families reach their educational, financial, and asset goals.

SUPERVISOR
DIRECT REPORTS

Director of Housing and Financial Literacy Services
None

QUALIFICATIONS

- Minimum educational requirement of a Bachelor's degree in business administration or a minimum of five years experience in the financial industry. NOTE: An associate degree will be accepted; on the condition the employee is already enrolled or enrolls in a bachelor's degree (ECE) program, which will be mandatory, to maintain employment. Failure to work towards a bachelor's degree will result in the relinquishment of said position.
- Financial services expertise: The applicant should have a background in financial coaching, banking, asset development and/or a related economic development field. The applicant should have experience working with low-income families in one or more of the following areas: financial goal setting, budgeting, credit building/rebuilding and debt repayment; utilization of quality financial services; and asset development.
- Skills: Excellent interpersonal, written and verbal communication skills. Demonstrate organizational skills, with the ability to handle multi-tasking. Knowledge of Microsoft Office software.
- Employee must have a Valid Virginia Driver's License and proof of current auto insurance where applicable.
- Employment is conditional pending immediate enrollment in Child Care Division – Criminal History Registry.
- Must present current TB/Physical at the time of employment or within 10 working days for TB test and 30 days for Physical.
- Possess or eligible to obtain financial coach certification within 90 days of employment.

SUPERVISORY RESPONSIBILITIES

- None

Essential Job Responsibilities: Performance Indicators

- Provide direct service including conducting trainings and one-on-one coaching, aimed at helping others build financial capability, change financial behavior, and achieve financial goals.
- Conduct and coordinate intake and holistic assessments of individual and family clients.
- Educate clients on the value of financial capability services and engage clients in a longer-term coaching relationship as appropriate.
- Assist clients in identifying and addressing current financial opportunities and challenges, while providing a holistic perspective on overall financial stability in order to help clients move towards proactive financial management and long-term success.
- Develop individualized financial stability plans in collaboration with clients, assisting with goal-setting, money management, savings, credit building, debt management, utilization of financial services and products, tax preparation, benefit screening, employment services, etc.
- Identify and refer participants to other community resources and services, as needed, to achieve clients' financial goals.
- Identify, cultivate and maintain effective relationships with key providers of other community resources and services, coordinating efforts as needed in order to maximize client impact.
- Review financial plans to identify needs/gaps.
- Follow-up, monitor, and evaluate progress with clients.
- Track and compile outcomes of services provided; provide information and prepare reports on a regular basis.
- Perform outreach and attend events to market services, recruit customers and build relationships with partners.
- Promote HRCAP Financial Literacy Services to local businesses, the social service community and other key groups.
- Represent HRCAP at various community meetings, conferences, committees; attend and participate in HRCAP special events to support our fundraising efforts.
- Other duties within the scope of this position may be assigned.

RECEIPT OF JOB DESCRIPTION

I have received, reviewed and understand this job description. I further understand that I am responsible for satisfactorily performing the essential duties described in the job description. I understand the job functions may be changed from time to time. I will be able to perform the essential functions of this position with or without accommodation. I understand that if I will need an accommodation for this position, I will inform Human Resources and management of my accommodation needs.

Print Name _____

Employee Signature _____

Date _____