



Financial Capability Coordinator Job Description

Overview: Beyond Housing exists because home matters. We begin with actual houses and housing preservation, focusing on quality and stability to give people a place to start. But there is more to a home than the house ~ home is about the life that happens in and around the house, as well as the life that fuels and draws out the best of the people within it. That life, in turn, is shaped by the community, its influences, its structures, and the people and dynamics that define it.

Beyond Housing helps entire communities become better places to live. We engage where we're needed, focusing on building consensus among leaders, providing and preserving housing, fostering community structures that shape lives, and guiding systems that make people's lives better.

We lead with vision for what a community can be ~ every community is different, but thriving communities tend to share the same basic set of positive traits regarding housing, safety, education, health, infrastructure, and access to basic human services.

We bring together leaders and resources, volunteers and citizens, and pursue a wide assortment of creative approaches to build stronger, healthier communities for life.

Finally, we are community builders, not kingdom builders. "It's their neighborhood, future, & dreams". Our objective is to help build, and contribute the good things we do for the sake of adding value to the lives of the people we're honored to serve.

Position: The Financial Capability Coordinator provides financial capability client services and administration support for Financial Advising and Rental Housing clients in the Financial Capability program. An ideal candidate would possess a positive attitude with a willingness to assist across multiple disciplines and should easily grasp new information, technology and processes quickly with little required supervision.

Client Level Financial Capability Responsibilities include, but are not limited to:

- Manage instruction, planning, and facilitation of all financial education orientations and instruction for approximately 60 Individual Development Account (IDA) clients provided 2-4 times per year
- Facilitate and plan asset-specific training courses including micro-enterprise, home-improvement, and post-secondary education classes
- Provide credit counseling, budgeting instruction during initial visit and during client saving period
- Open IDA accounts – requires face-to-face meeting with client – 1 to 2 hours
- Maintain a schedule of appointments for client sessions and effective/efficient systems for customer reminders & follow-up for those that miss appointments
- Complete necessary paperwork to open Individual Development Accounts for clients
- Enter client data into CMS
- Oversee all client progress to ensure asset-specific training is completed prior to match withdrawal.
- Monitor clients' monthly deposits
- Send out monthly deposit reminders, class schedules and reminders and monthly account statements

Financial Capability Support Services Responsibilities include, but are not limited to:

- Provide comprehensive support and financial coaching services among Financial Capability programming clients to include: client follow-up, administration of Financial Well-Being survey, efficient client data entry, file compilation, coordination and delivery of items required for entry into CMS
- Assist in pulling credit reports for Financial Advising and Rental Housing clients on as-needed basis
- Assists with outreach plan to grow financial capability program

- Follow proper procedures and internal controls necessary to maintain the security of all systems and confidentiality of all records

Financial Advising Department Support Services Responsibilities include, but are not limited to:

- Conduct Financial Capability client satisfaction review throughout the process with administering electronic survey and compiling survey results
- Assist Financial Advising staff with outreach and orientations to partner lenders, real estate agents, and community organizations
- Assist Financial Advising staff with customer data entry in CRM (Salesforce) on as needed basis

Personal Qualities:

- Collaborative -- A dynamic personality that is collaboratively minded, can recognize and identify strengths, seek consensus around mutual goals, and build meaningful relationships.
- Creative and Curious -- A systems-thinker and builder, who is not afraid to be innovative in designing solutions and has skills in articulating these ideas and concepts.
- Methodical -- Strong analytical, systems, and problem solving skills to evaluate performance, prepare reports, and recommend/implement solutions using independent judgment. Ability to move from concepts to action through strong program design and evaluation.
- Reliable -- Leadership skills that reflect and value a team approach, demonstrated integrity, effectiveness, efficiency, and the ability to deliver high quality service. Highly capable of handling multiple tasks, projects and timelines. Excellent oral and written communications skills.
- Trusted -- Ability to work with residents, partners, and staff of diversified backgrounds with a positive, optimistic, solutions oriented attitude. Shares a deep respect for the community, its stakeholders and the residents that we serve.
- Driven -- Passion for the work and an interest in continuous learning and improvement.

Preferred Experience and Qualifications:

- BA/BS required. MA, MSW preferred
- Requires a minimum of two (2) years' experience, which demonstrates knowledge of a variety of field concepts, practices and principles related to program planning and implementation, personal finance, asset-building and Individual Development Accounts (IDAs)
- Excellent human relation skills and the ability to effectively work with persons from a broad range of social, economic and professional backgrounds are required.
- Must have an understanding of issues affecting impoverished and minority communities.
- Individual must possess proficient time management and multi-tasking skills.
- Proven ability to take initiative and work independently.
- Ability to work effectively in both individual and group settings
- Knowledge of Windows Operating System, CRM software, and Microsoft Office
- Willingness to work evenings, some Saturdays and maintain a flexible work schedule.

Supervisor:

- Financial Advising Manager

Supervises:

- None

Salary and Benefits:

- Full-time salaried position with benefits for full-time position as determined in current Beyond Housing Employee Handbook **Position is grant funded through December 31, 2018**

Application Instructions:

Please send resume and cover letter to hr@beyondhousing.org by August 21, 2017. For more information on Beyond Housing, visit www.beyondhousing.org

The above statements are intended to describe the general nature and level of work being performed by people assigned to this position. They are not intended to be a complete list of all responsibilities, duties, and skills required. Beyond Housing is an Equal Opportunity Employer.