

<b>Job Title:</b>	Bilingual Financial Coach
<b>Reports to:</b>	Economic Opportunity & Workforce Development Program Director
<b>Department:</b>	Economic Opportunity Program (EOP)
<b>FLSA Classification:</b>	Exempt
<b>EEO Category:</b>	2
<b>Pay Rate:</b>	Salaried
<b>Org Band:</b>	Associate
<b>SEIU Eligible:</b>	No
<b>Job Summary:</b>	<p>Community Action Marin is the largest human services provider in Marin County and is designated by the County Board of Supervisors as the “official anti-poverty agency.” We are working to make Marin a place where all of us can live with dignity and respect and have an equal opportunity to support ourselves and each other. For over 50 years, we’ve been there when our community needed us most. We now offer more support to more people than any other organization in the county, but demand is growing every day.</p>

The Bilingual Financial Coach assists with the planning, coordination, and implementation of Economic Opportunity & Workforce Development services including, but not limited to, special events and activities that support financial literacy and education, data collection, employment, and college success. This individual will also co-manage data entry for all SparkPoint services utilizing a Salesforce-based online data collection system. The Coach will maintain a library of materials and online resources related to financial literacy and education. The individual will provide personalized financial coaching and will facilitate financial education workshops and deliver community presentations. He/she will assist individuals with accessing and obtaining public benefits and community resources and will connect them to employment and training opportunities. Most importantly, the Coach will provide a positive experience for community members based on the organization’s shared values of Relationship, Unity, Service, and Inclusivity.

#### **Primary Responsibilities**

- Provides individualized family-center coaching to community members in English and Spanish and supports their work toward their personal, career, educational and financial goals.
- Engages with prospective clients to help them navigate the enrollment process, including orientation attendance, welcome packet completion and appointment scheduling.

- Supports the Volunteer Income Tax Assistance Program, including outreach for tax volunteers and community participants.
- Exchanges information with clients, staff, other social service agencies, community and business representatives, governmental agencies and the general public regarding SparkPoint services, including eligibility requirements, required forms, etc.
- Delivers presentations as a program and agency representative.
- Provides services off site at several CAM service hubs located throughout the county.
- Plans joint events with partner agencies.
- Refers clients to community, business, governmental, educational, and other partner organizations to meet their unique needs.
- Conducts timely follow-up to determine client needs, track progress toward short- and long-term goals and celebrate successes.
- Maintains orderly and confidential member files and documentation, including detailed case notes, next steps, referrals, and follow-up assessments.
- Records all activities and assessments completely and accurately into the central SparkPoint database for tracking and reporting purposes.
- Translates English program materials into Spanish and conducts agency orientations and coaching appointments in Spanish to ensure we are able to meet the unique needs of our Spanish-speaking community.
- Uses a variety of software to compose, format and prepare correspondence, reports, presentations, and other materials.

### **Qualifications**

- Bachelor's degree or equivalent work experience;
- Bilingual in English/Spanish;
- Previous experience in financial literacy and/or asset building;
- Commitment to racial and economic justice;
- Strong commitment to Community Action Marin's mission and interest in working with low-income people from diverse backgrounds;
- Familiar with the issues faced by individuals and families who are struggling with employment, financial and other barriers;
- Proficiency in using a variety of computer software to track and monitor data, including but not limited to, Microsoft Office (Word, Excel, PowerPoint, Outlook) and case management software
- Strong analytical, time management and organizational skills and the capacity to integrate diverse objectives with a high level of attention to detail;
- Excellent problem solving skills;
- Superior listening, communication, and facilitation skills;
- Ability to maintain confidentiality of sensitive information;
- Deep understanding about – and ability to articulate – the role equity, inclusion, and diversity play in our work;
- Possess CA driver's license and reliable transportation;
- Ability to work flexible hours (including evenings and weekends) as needed.

### **Physical Requirements**

- Bend: flexion of the upper trunk forward while standing and knees extended, or knees flexed when sitting
- Lift: exertion of physical strength to move objects 10-25lbs from one level to another
- Carry: hold or rest weighted objects 10-25lbs directly on hands, arms, shoulders or back while moving from one location to another
- Climb: ascend/descend with gradual or continuous progress, using both hands and feet
- Push: exertion of force on or against an object (weight/size) to move it from one location to another.
- Feel: perceiving attributes of objects, such as size, shape, temperature, or texture by touching with skin

### **Acknowledgements**

Community Action Marin is an Equal Opportunity Employer and Prohibits Discrimination and Harassment of Any Kind: We are committed to the principle of equal employment opportunity for all employees and to providing employees with a work environment free of discrimination and harassment. All employment decisions at our agency are based on business needs, job requirements, merit, alignment with agency core competencies, and individual qualifications, without regard to race, color, religion or belief, national, social or ethnic origin, sex (including pregnancy), age, physical, mental or sensory disability, HIV Status, sexual orientation, gender identity and/or expression, marital, civil union or domestic partnership status, past or present military service, family medical history or genetic information, family or parental status, or any other status protected by the laws or regulations in the locations where we operate. Community Action Marin will not tolerate discrimination or harassment based on any of these characteristics.

By signing below, I acknowledge that I have received a copy of this job description. I further acknowledge that I can perform the essential duties and responsibilities of the position with or without reasonable accommodations.

Note: Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_