Financial Coach Volunteer

Purpose:
A Financial Coach volunteer will join the Economic Justice team in strengthening the delivery of our services to prospective clients. Through constant interaction with community members and the maintenance of digital records, the volunteer will play a key role in ensuring better outcomes for all those seeking Agency services.

Agency contacts:
Volunteer Services – volunteer@camarin.org

Responsibilities and duties:
● Provides individualized family-center coaching to community members and supports their work toward their financial goals.
● Engages with prospective clients to help them navigate the enrollment process, including orientation attendance, welcome packet completion and appointment scheduling.
● 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.
● Refers clients to community, business, governmental, educational, and other partner organizations to meet their unique needs.
● Conducts timely follow-up, tracks progress toward short- and long-term goals and celebrates successes with clients.
● 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 SparkPoint database for tracking and reporting purposes.
● Adhere to Agency privacy and confidentiality standards, and code of ethics.
● Communicates with individuals in a respectful manner and responsive approach to differing beliefs and practices, sexual orientations, disability statuses, gender identities, ages, cultural preferences, linguistic needs, and other state and federal protected statuses.

Time commitment:
● Flexible weekly schedule commitment (4-6 hours preferred)
Required skills and qualifications:

- Bachelor’s degree or equivalent work experience
- Proficient in English; and proficiency in Spanish strongly preferred
- 5+ years of experience in financial literacy and/or asset building field
- 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

Benefits to volunteer:

- Volunteer for Marin County’s largest nonprofit social services provider
- Assist Community Action Marin with embodying a whole-family approach
- Professional development opportunities available
- Office equipment provided (if desired, may use personal devices)
- Make a tangible impact within the community
- Letters of reference (long-term volunteer commitments)
- Fun, inclusive, and engaging work-environment

Location:

- Virtual opportunity

***Community Action Marin is currently closed to the public due to the COVID-19 health crisis. Onsite capabilities to be re-evaluated based on local, state, and federal guidance ***

Reasonable Accommodations:

This opportunity may involve physical demands (e.g. climb stairs, carrying, lifting, etc.) as the actions are essential function to the role. Reasonable accommodations may be made to enable individuals with qualifying disabilities to perform essential functions.