FINANCIAL NAVIGATOR

GENERAL PURPOSE OF THE POSITION:

The role of the Financial Navigator is a program manager, dedicated to helping the local ALICE population families change financial behavior, build assets and become financially stable. Provide individualized financial coaching for participants to help them set and reach target goals including credit score, budgeting, savings, utilization of quality financial services, and asset development. Work directly with ALICE families/individuals to ensure they reach their educational, financial, and asset goals. Work directly with community partner organizations and businesses to provide one-on-one financial coaching services.

FLSA STATUS: EXEMPT (F/T)

WORK SCHEDULE: Core Office Hours of Monday-Friday, 8:00 a.m. to 4:30 p.m.

Must be able to work a flexible schedule with the possibility of early evening, and weekend work.

REPORTS TO: Chief Impact Officer

PRINCIPAL DUTIES AND RESPONSIBILITIES:

- Financial coaching: Develop and provide one-on-one coaching for participants. Assist participants with goal setting, budgeting, credit building/rebuilding, debt repayment, savings, utilization for quality financial services, and asset development. Monitor participant progress toward financial goals. Follow up with participants on referrals to other financial service professionals when applicable. Maintains files and database for all participants including the intake form, credit report, coach's appointment notes, analysis and corrective action plan.
- Financial Education Classes/Workshops: Work with Financial Stability Manager to develop and conduct financial education classes. Evaluate participant engagement (onsite/offsite) financial education classes. Facilitate/Co-Facilitate RUW ALICE Simulation activities and events on and off site as needed.
- Financial Stability Focus Area Council: Co-facilitate meetings. Recruit and engage appropriate community experts, donors and volunteers as Council members. Work closely with CI team identifying and tracking Financial Stability focused community programs and services for RUW grant support.
- Data collection and evaluation: Collect and verify all required data from participants throughout the program. Assist in program reports preparation.
- ALICE Assistance: Supervise the Intake Coordinator to ensure the efficient management of the ALICE Assistance Fund to assist eligible individuals and families.
- Resource referrals: Identify and refer participants to other resources and services needed to achieve their financial goal. Identify, cultivate, and maintain relationship with key community partners.
- General program support: Provide support, as needed, to other core programs including cross training in other service areas. Assists with special projects as assigned and other tasks deemed necessary to achieve overall goals and to operate a successful program.
- Policy and Guidelines: Adheres to all guidelines related to confidentiality.
- Maintain a flexible work schedule as needed.

EDUCATIONAL PREREQUISITES:

- Bachelor's Degree preferred, but not required
- Financial literacy 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-moderate-income households 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.

QUALIFICATION/REQUIREMENTS:

- Highly motivated self-starter
- Excellent communication and organizational skills
- Ability to work on multiple projects to meet deadlines
- Ability to interact effectively and confidently with individuals at all social and economic levels
- Ability to present information and data in written, electronic and oral forms
- Ability to work with little supervision
- Flexible, adaptive and positive in a constantly changing environment
- Detail-oriented, with a willingness to learn new skills and techniques to promote quality, efficiency and successful customer outcomes
- Ability to identify internal weaknesses, identify solutions, and to adapt coaching methods and tools to create more effective organizational and client outcomes
- Ability to sense when clients are overwhelmed and to break major objectives in manageable steps
- Dedication to engage/motivate/encourage clients and help them resolve challenges and accomplish goals
- Creative, practical and strategic problem-solving skills
- Proficient with Microsoft Office and web-based applications
- Must have the equipment and ability to post on company social media sites
- Must have the use of a reliable vehicle for transportation to outside meetings

SKILL AND EXPERIENCE PREREQUISITES:

- Between 1 to 3 years of prior relevant work experience.
- Experience working with nonprofits
- Excellent interpersonal, written and verbal communication skills.
- Organizational skills, with the ability to handle multi-tasking.
- Proficiency in English and Spanish is a plus.

PHYSICAL & MENTAL DEMANDS:

Requires sitting for long periods of time at a computer and keyboarding for up to 7 hours a day. Requires the ability to multi-task between program duties and various volunteer site locations throughout PD16. Typically lifts program files, supplies, computer equipment and storage boxes of 25-50 lbs.

PROFESSIONAL EXPECTATIONS:

- Maintains confidentiality of agency, donor, client and volunteer records
- Work as a team member with staff and volunteers
- Complies fully with the corporation’s Code of Ethics
- Completes all assigned responsibilities in a timely manner

The statements made herein are intended to describe the nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

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EMPLOYEE SIGNATURE DATE