Job Title: Financial Coach
Department: Financial Capabilities
Immediate Supervisor: Senior Financial Coach

Position Description:

The Neighborhood Developers' Financial Capabilities team helps individuals and families in low-income situations to maximize their resources, develop short- and long-term financial goals and manage their resources as effectively as possible. While clients work towards their goals, the team ensures that clients get the knowledge, skills and support to become financially confident and able to navigate mainstream economic structures successfully.

TND's Financial Capabilities team is a primary partner in the CONNECT program, a partnership of five organizations that offer services under one roof and seek to integrate those services as seamlessly as possible for the convenience and benefit of our clients. ***CONNECT services are currently all delivered remotely; as pandemic conditions change, we anticipate a return to our physical space at TND's offices in Chelsea and Revere. This position will be a work-from-home position until that time.***

TND's Financial Coaches play a major role in helping people transform their lives. As a coach, you will conduct one-on-one client-centered coaching sessions designed to build a trusting relationship, help individuals identify and articulate goals, support them as they develop and execute an action plan over a period of 6-24 months, help them hold themselves accountable to their own goals, and celebrate their progress. You will learn TND's approach to financial education, share responsibility with several of your colleagues for delivering the menu of classes we offer (starting with one type of class, and slowly building your capacity to deliver all of them), and actively contribute to improving our product. You will learn how to identify a good candidate for several mainstream and grant-supported financial tools that can benefit clients (such as a credit-building loan), and help your clients access them where appropriate. Finally, you will constantly expand your knowledge of various programs and services that can be useful to your clients, assist your clients in understanding their options, and help them access those supports.

Coaches are expected to ensure appropriate case management, including excellent communication and follow up with clients; accurate and timely tracking of activities and progress toward goals in our Salesforce database; active use of professional development opportunities and case conferencing with other coaches to support your clients' progress and your own skills; and use of TND's custom data dashboards to identify and act on priorities.

The Financial Coach is actively encouraged to build relationships with colleagues inside and outside the organization, particularly within the CONNECT partnership; seek out training and other professional development opportunities that strengthen his or her financial knowledge and coaching practice; experiment with different ways to build a community of clients for peer support; and suggest new services, ways of delivering services, or ways to market services, that better meet clients' needs and/or make better use of the department's resources.

Responsibilities and Duties:

- Build a caseload of 100 active clients over the course of the first year.
- Provide one-on-one coaching to an active caseload of no more than 100 clients at a time, maintaining communication with clients on at least a monthly basis.
- Actively manage the caseload, identifying disengaged clients who should come off the caseload and clients whose progress and self-efficacy meet our standard for "graduation-ready."
- Keep database up to date with documentation of service delivery and client outcomes.
- Refer clients to appropriate services and supports both within the CONNECT network and to external services, and follow up on referrals made by others to coaching.
- Attend monthly all-staff meeting, as well as regular departmental meetings and occasional CONNECT partnership meetings, and meetings specific to the coaching team as scheduled by the Senior Financial Coach.
- Undertake other activities and duties as requested, such as: support other departments' events, speak to a community group, serve as a liaison to other organizations, disseminate surveys, convene focus groups, represent TND in funder meetings, prepare clients for public speaking, and contribute to departmental reports.

Required Qualifications:

- Fluent in English and Spanish, or another second language (both written and verbal)
- B.A. in Human Services, Psychology, Social Work, Accounting, Finance, or other relevant field; unrelated degree with relevant work experience also accepted
- Basic knowledge of coaching versus counseling versus consultative relationships
- Basic knowledge of budgeting, credit, debt management, and saving/investing
- Basic knowledge of the factors that support and hinder economic mobility
- Excellent relationship-building / people skills
- Strong computer skills (comfortable using the following, or similar tools: Microsoft Word, Excel, Google Docs, Zoom, DropBox and Salesforce)
- Excellent client and team communication skills – has a sense of what needs to be communicated, to whom, how often, and in what way, for the client and team to be successful
- Well-organized, able to prioritize among competing tasks, and able to work independently
- Able to work a weekday evening or Saturday no more than twice/month.

Highly Desirable Qualifications:

- MSW, CFP, or other relevant graduate degree or certification
- Experience delivering coaching services
- Previous experience working with low-income and culturally / ethnically diverse clients
- Experience working in a non-profit organization
- Knowledge of community resources in Chelsea and surrounding communities
- Interest in / experience with personal finance
- Experience working in multi-organization collaborations / partnerships
- Strong work ethic, a good sense of humor, and a commitment to social justice

To Apply

Opportunity Communities, and members Nuestra Comunidad and The Neighborhood Developers, are equal opportunity organizations. We recruit, employ, train, compensate, and promote without regard to

race, religion, creed, color, national origin, age, gender, sexual orientation, marital status, disability, veteran status or any other basis protected by applicable federal, state, or local law.
Please submit a cover letter and resume to the following link: https://www.tfaforms.com/4727949

About CONNECT
CONNECT is a partnership of five organizations working together to help people increase their economic security. Headquartered in Chelsea, CONNECT offers job placement, training, adult basic education, housing counseling, financial coaching, specialized banking products, free tax preparation, and assistance with accessing public benefits. See connectnow.org

About TND
The Neighborhood Developers is a Community Development Corporation located in Chelsea, MA. Our mission is to bring our core strengths—building homes, engaging neighbors, and fostering economic mobility—to community partnerships that create great neighborhoods where all people can thrive. See theneighborhooddevelopers.org.