Financial Coach Job Description

Department: Asset Building
Job Title: Financial Coach
Status: Full-Time / 40 hours per week
Direct Supervisor: Financial Empowerment Coordinator

About Lawrence CommunityWorks

Lawrence CommunityWorks, Inc. is a community development corporation that weaves together community planning, organizing, and asset-building efforts with high-quality affordable housing and commercial development to create vibrant neighborhoods and empowered residents. By facilitating conversations and action on community priorities, LCW engages partners and a network of youth and adult residents in opportunities to move themselves and the city of Lawrence forward.

The Asset Building Department provides financial, homeownership and employment program strategies with the objective of helping low- and moderate-income residents achieve greater financial stability and long-term upward economic mobility. We accomplish this by delivering services that equip residents with financial knowledge and skills, provide ongoing social and community support, and present an empowering and motivating environment that fosters ongoing personal and community progress and success.

Position Description: Financial Coach

The Financial Coach will be responsible for providing face-to-face financial counseling and guidance to LCW members seeking to achieve financial stability and progress. The Coach will utilize coaching techniques and skills to conduct financial analysis, assist with goal setting, and develop a financial plan that will help participants overcome financial barriers, meet their goals and progress financially. Specifically, the Financial Coach is striving to help participants gain greater financial stability by helping them achieve greater income, reduce debts, increase assets and net worth and develop financial management skills that lead to improved financial decisions and habits. The coach will also assist participants in accessing financial resources and products that help participants attain their financial goals. The Coach seeks to promote a culture of asset building and financial knowledge among Lawrence residents through training and education and participates in developing collective action strategies to stop predatory practices in the City of Lawrence.

Responsibilities

- Provide ongoing individual financial coaching to support participants in developing, pursuing and achieving their financial and employment goals and/or help them overcome their financially-related barriers and hardships to achieve upward economic mobility and financial stability, including conducting needs and goals assessments, developing and managing written action-based plans designed to achieve or resolve identified participant individual goals and barriers and managing referrals to reputable and relevant resources.
- Manage participant caseload and conduct on-going follow up with participants, and partners to ensure participants success in accomplishing goals or resolving barriers to financial stability.
- Deliver group financial workshops for participants including: money management, banking, credit and debt management, savings and wealth building, taxes and insurance, and other financial topics.
- Conduct proper file maintenance, adhering to standard practices and ensuring complete security of sensitive information.

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- Establish and maintain regular presence and relationships at various program sites as assigned to conduct onsite coaching, education and support services.
- Conduct marketing and outreach for coaching services and LCW programs as a whole.
- Connectivity: ensure that counseling and workshop participants have opportunities to connect to other LCW resources.
- Ensure counseling and education production is sufficient to meet participants needs, project goals, and operational standards and guidelines as established by management and funding agreements.
- Maintain integrity and productivity of program data gathering and data entry, reporting and evaluation.
- Adhere to ethical principles and standards, prioritizing the well-being of participants.
- Attend required training and recommended professional development and networking opportunities to advance personal and project capacity.
- Work closely with project partners to ensure that efforts are grounded in deep understanding of participants strengths and barriers.
- Other tasks as assigned by Department Director.

Qualifications and Skills

- Bachelor’s Degree or direct relevant experience coaching and training others required
- Must be flexible and willing to work evenings and weekends as needed
- Ability to work with financial calculations and understand figures and trends
- Critical thinking and problem solving skills
- Ability and experience working with populations of limited resources with empathy and compassion
- Outstanding communication and interpersonal skills
- Proven ability to work with efficiency and purpose
- Self-starter, self-disciplined, well-organized, with excellent follow-through
- Must have transportation and be available to travel
- Bilingual English and Spanish required; culturally competent necessary

How to Apply: Send Cover Letter & Resume to: recruiting@lawrencecommunityworks.org
Lawrence CommunityWorks
168 Newbury Street
Lawrence, MA 01841

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