

Job Title, Organization Name, Full Time or Part-time

Financial Coach, Southeast Community Services, Full Time

Position Introduction

Are you energized by the idea of fighting for financial protections for marginalized communities? SECS is seeking a financial coach to work alongside our neighbors to achieve their goals. If you will bring that sense of excitement and knowledge to our neighbors, SECS wants to talk with you. Come work with a great team that cares about our community and neighbors!

Organization Overview or Description

The mission of Southeast Community Services, Inc. is to “work together to serve, strengthen and support our neighbors in southeast Indianapolis.” Southeast Community Services, Inc. (SECS) utilizes the Center for Working Families (CWF) program model for the delivery of our services. The program embraces four primary components to assist participants in moving toward financial stability. These components include employment, finances, education, and access to work supports.

Position Duties

As a Financial Coach, you are part of our vital work of supporting economic mobility and your passion for providing exceptional service to our neighbors contributes to our high level of positive outcomes. Acting as a front-line coach to our neighbors you will communicate in an open, helpful and engaging tone and focus on finding the right pathway with each neighbor.

We need a coach who will interact discreetly and effectively with neighborhood residents on a range of financial and asset building issues. Financial Coaches work on topics ranging from rebuilding a credit score, saving for a car, paying off debt, or creating a budget. Additionally, you will have the opportunity to work on system level improvements for our neighbors. Your commitment to this community means a willingness to work flexible hours that best meet the needs of participants and participate in community outreach.

Primary Responsibilities:

Southeast Community Services, Inc. (SECS) utilizes the Center for Working Families (CWF) program model for the delivery of social services. The job responsibilities include:

Coaching (75%)

- Using the co-active coaching model to interact with neighborhood residents.
- Developing strong coaching relationships with our neighborhood residents for long-term results.
- Providing one-on-one financial coaching to CWF participants, including assessing financial situations and helping them to develop realistic spending, savings, and debt management plans, improving or building credit, developing emergency savings funds, and building assets (retirement, education, housing, etc.).
- Teaching financial workshops.
- Creating and maintaining an environment of work, not school, while modelling appropriate workplace behaviours.
- Sourcing new personal finance tools that could assist neighbors with achieving financial goals.

Data (15%)

- Managing outcome tracking and documentation requirements for the financial coaching component of CWF or other funded programs.
- Regularly documenting progress of participants through Efforts to Outcomes and Salesforce or any additional data collection systems.

Other Duties (10%)

- Coordinating and working with all team members to promote and facilitate participation for potential individuals that might benefit from the program.
- Developing relationships with financial institutions to encourage more affordable financial products and services for CWF constituents.
- Assisting with the running of the VITA program each year.
- Performs other duties, as necessary and requested by supervisor.

Preferred Experience, Skills and Qualifications:

- Fluency, both written and spoken, in Spanish and English required
- Experience in business, finance, or a related field *is preferred* relevant experiences are highly valued.
- High school diploma or equivalency required. College education/degree is optional.
- Proven ability to successfully apply coaching skills with the target population.
- Excellent social/interpersonal skills and writing ability commensurate with the communication and reporting requirements of the position.
- Team-focused mindset.
- Record of handling sensitive information appropriately.
- Strong computer skills including experience with MS Office applications, using the Internet and database management.
- General knowledge and understanding of the needs of a low-income working population, as well as knowledge of available community resources.
- Well-organized and self-directed, with ability to manage multiple tasks and priorities with great attention to detail.
- Culturally competent and able to work with diverse neighbors
- Must be flexible to work nights/weekends when required
- This position requires local travel, and access to reliable transportation is required.

Work Environment

- There will be some instances when work in the evening may be required, working on Saturdays will be required for the tax season.
- SECS offers the opportunity to flex time when approved by supervisor.
- Work from home is not a regular part of our culture; however, special circumstances will be considered.
- SECS is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

Salary & Benefits

SECS believes in salary transparency; therefore, all our job postings include a salary range.

- This position will pay between \$38,000 and \$42,000 yearly depending on experience.
 - Considerations given for bilingual Spanish/English speakers
- SECS offers 11 paid holidays per year
- Employer paid life insurance & long-term disability policies
- 20 days of PTO per year
- A matched 401K plan (up to a pre-defined amount)

- Medical benefits with a large portion of costs covered by SECS

To be offered this position, you must agree to submit to a criminal background check and be eligible to work in the US. Previous justice involvement does not preclude hiring.

E-mail address for resume submission: Must submit a cover letter and resume to SECSIndy@gmail.com. No phone calls please.

Please answer the following questions and submit with your resume:

- *What experience or qualities do you feel make you a uniquely qualified match for this position?*
- *What do you think is the biggest hurdle to financial stability?*