HAMPTON ROADS WORKFORCE COUNCIL (HRWC)

POSITION DESCRIPTION

FINANCIAL COACH

**General Definition:** This position provides and/or facilitates direct financial coaching and financial education services for low to moderate income individuals who are enrolled as Financial Opportunity Center (FOC) participants. The Financial Coach is responsible for assisting participants with the development and implementation of a plan of action to help them reach their workforce related goals and achieve and maintain financial stability. The Financial Coach will also work with employment counselors that support the activities of the FOC and assist participants with the application for and obtainment of income support benefits. These benefits may include but are not limited to public benefits such as SNAP, TANF, Social Security, Medicaid, LIHEAP, and more, and other benefits to include EITC and other tax benefits, free eyeglasses and emergency cash assistance, in order to assist participants with the attainment of financial stability. Services will be delivered through a combination of “one on one” and workshop modalities. Two (2) positions are authorized under this position description, one (1) will be primarily housed at the FOC in Norfolk and the other at the FOC in Newport News, Virginia. Work is performed under the general supervision of the VCW Senior Director for Administration. This is a temporary, full-time Grant funded position.

**Description of Duties:** The person in this position is required to:

1. Conduct and document general income support benefits screenings for program participants and assist participants with the application process.

2. Maintain contact with program participants throughout their program participation and monitor the status of their income support benefit applications.

3. Use the Efforts to Outcome (ETO), a client management system, to document and reflect the outcomes for program participants.

4. Conduct a detailed financial health assessment of program participants to be documented and updated on the Combined Financial Assessment (CFA). Work with participants in order to develop a budget and balance sheet and assist them with strategies for improvement of their credit scores, net worth and overall financial health.

5. Teach participants about the value of FOC services and activities and engage them in a long term relationship. This may occur on a “one on one” basis or in a workshop setting.
6. Conduct and/or facilitate relevant workshops for program participants. Engage subject matter experts to be included in the process. Develop workshop materials and/or tailor existing materials to meet the needs of the participants and community. Set agendas and schedule workshops.

7. Develop and implement plans of action and provide tools, resources and accountability for participants in order to assist them to meet their goals. Work with employment counselors in the implementation of workforce related services and activities in support of participant financial wellbeing.

8. Cultivate a strong working relationship with local Departments of Human Services and create and maintain a network of referral organizations within the local community to assist participants with obtaining income support benefits and access to other relevant financial education resources.

9. Perform related tasks as needed.

**Qualifications Required:** Any combination of education and experience equivalent to a Bachelor’s Degree from an accredited college or university in business administration; public administration; counseling; social services; finance; or, related field, and one (1) year of related employment experience, with previous work experience in the social services sector or with low income individuals preferred. Experience in the use of computers and administrative software applications to include Microsoft Word, Excel and PowerPoint; excellent oral, written, and interpersonal skills; Internet and Resource Savvy; strong communication skills; ability to develop and make formal informational presentations in a workshop setting; ability to establish and maintain effective working relationships with others; and, proficiency in the tracking, documenting, compiling and reporting of data. Possession of a valid driver’s license and access to a reliable automobile for work related travel purposes.