

Job Title: Financial Capabilities Coach (Bilingual)

FLSA Classification: Hourly/Non-exempt

Position Status: Full Time

Department: Community Empowerment

Supervisory Responsibilities: NA

Reports To: Financial Empowerment Manager

Don't meet every single qualification? Studies have shown that women and people of color are less likely to apply to jobs unless they meet every qualification. At Lacasa we are dedicated to building a diverse, inclusive, and authentic workplace, so if you're excited about this role but your experience doesn't align perfectly with every qualification in the job description, we encourage you to apply anyway and let us know why you may be just the right candidate for this role.

Job Purpose

Equip people to unlock their potential through meaningful delivery of individual financial coaching, group education facilitation, and fair lending for eligible clients. The Financial Capabilities Coach is organized and attentive to clients as well as the corresponding documentation, files, and reporting requirements. Lacasa Financial Coaches and Counselors are at the front line of empowering our community to experience financial stability and success.

Essential Job Duties and Responsibilities

Service delivery

- Perform client scheduling, ensuring timely and efficient appointments for intake, follow-ups, and workshops.
- Provide and facilitate group education workshops in the Master It Series and collaborate with the team on updates and revisions (homeownership, money management, credit building, and managing debt).
- Evaluate client eligibility and readiness for auto lending program through one-on-one assessments to help clients access affordable lending and be successful in repaying their loan.
- Create action plans that support and build client's financial capability using affordability and financial assessment tools.
- Perform on-going case management to provide service and problem-solving assistance in the area of financial capability.
- Align, manage, and assist clients with appropriate and available grants and programs.
- Interact and collaborate with other community partners and Lacasa team members in pursuit of providing relevant and effective advice to clients.
- Assist other members of the department with document translation and provide translation services during client appointments to ensure clear communication.
- Assist in the administration and facilitation of other programs as assigned.

Record-keeping

- Enter all client activity data accurately and in a timely manner in appropriate Client Management Systems.
- Ensure the collection of and maintenance of specific information from clients in accordance with all laws and governing organizations.

Other expectations

- Comply fully with training and continuing education requirements as directed by supervisor.
- Participate in staff meetings and the Lacasa annual meeting.
- Participate in community events and outreach as directed by supervisor.

Qualifications

Education

Associate degree or higher in education, business, finance, or related field. A combination of acceptable education and experience that has provided the necessary knowledge and skills to fulfill the requirements of this position may be considered, which includes exercise of initiative, attention to detail, and independent judgment.

Experience

- Bilingual required (English and Spanish)
- Multi-cultural experience preferred.
- Ability to handle sensitive and confidential data with integrity.
- Excellent clerical and computer skills: proficient or advanced skill in Microsoft Suite and Zoom.
- Record of success with data management.
- Records management principles and practices, and research methods and techniques.
- Able to perform basic budgetary math.
- Attention to detail and highly organized, flexibility in adjusting to shifting priorities.
- Able to communicate complex ideas simply and succinctly.
- Careful attention to detail and strong sense of initiative with a process-improvement and continuous learning mindset.

Performance Factors

- Respect for others and for Lacasa's mission and core values: **Respect Human Dignity, Work Together, Pursue Excellence, Build to Last.**
- Demonstrate impartiality and objectivity in all client interactions, presenting information and resources in a neutral manner that empowers clients to make informed decisions without influence from personal opinions or biases.
- Excellent written and verbal communication.

- Problem-solving and solution-driven mindset.
- Knowledge of Lacasa services.
- Outstanding ability to work with people from varying backgrounds and education levels, broad range of social, economic, cultural, and professional backgrounds.
- Punctual with the ability to handle schedule flexibility.
- Organized with attention to detail.
- Quality of work.
- Reflects a positive image to staff, clients, and community. Relates graciously with the public in stressful environments.

Working Conditions

- Some evenings and Saturdays required.
- Able to communicate and exchange information daily in an office setting.
- Accepts moderate noise (i.e., business office with computers, phone, and printers, light traffic).
- Ability to remain at a computer terminal for an extended period.
- Some local travel required. Must provide a personal vehicle with adequate vehicle liability insurance.

Applicant/Employee Signature

Date

Hiring Manager/Supervisor Signature

Date

This job description is not designed to cover or contain a comprehensive listing of all activities, duties, or responsibilities that are required of the employee. Duties, responsibilities, and activities may change, or new ones may be assigned at any time with or without notice.