ALL PEOPLES COMMUNITY CENTER

Financial Coach/Financial Case Manager (Full Time, Non-Exempt)
Department - FamilySource Center (FSC)
Salary: $25.00, Plus Benefits
Address: 822 East 20th Street Los Angeles, CA 90011

ALL PEOPLES COMMUNITY CENTER

All Peoples Community Center (All Peoples) is an 81 year old community resource center located in South Central Los Angeles; it is a 501(c)(3) non-profit. Since 1942, the center has been a safe haven for its community, providing an array of services that empower individuals and promote community respect and self-determination for all. In 2016, All Peoples became a FamilySource Center, a program led and funded by The City that aims to eliminate poverty for families living in the city of Los Angeles.

FAMILY SOURCE CENTER

All Peoples FamilySource Center program works to provide a continuum of services focused on addressing the urgent needs of families, empowering families to obtain greater financial security, fostering opportunities for improved academic achievement, and building community wealth. Its goal is to serve a total of 2,600 participants annually.

JOB DESCRIPTION

Provide one-on-one and group financial coaching services to improve the financial stability and empowerment of All Peoples FamilySource Center (FSC) participants. The goal of the FSC program is to alleviate poverty, and focuses on the well being of the whole family. It emphasizes education, economic opportunity, and meeting the basic needs to achieve greater financial stability, and creating a legacy of economic security that will pass from one generation to the next. As part of the FSC team, the Financial Coach will work directly with families/individuals in the FSC program to ensure that families reach their financial goals and the FSC programmatic goals are met.

RESPONSIBILITIES

Financial Coaching

- Create and implement customized curriculum-based financial literacy training and training modules that expose participants to financial concepts, terminology, and money management strategies in savings, debt reduction, credit building, asset building, and banking
- Serve 200 unduplicated participants annually with at least two financial resources.
- Conduct one-on-one coaching sessions that include the completion of at least one milestone in each session
    - Create an Action Plan with each participant to ensure they are working toward their self-identified, financial goals
    - Incorporate services into the participant service plan in partnership with the case manager, including case conferences and discussion
    - Implement participant retention and engagement strategies to help participants achieve their financial goals
- Achieve programmatic goals by assisting participants in opening savings and checking accounts, and establishing 529 college savings plans, and/or IRAs. Guide participants in enhancing savings and reducing consumer debt by 10%. Provide support in reducing delinquent accounts and

rent-to-income ratios. Measure success based on participants' ability to meet and sustain basic needs for 90 and 180 days. Track improvements in participants' credit scores and overall financial well-being, including the successful achievement of home / asset ownership
- Develop, conduct, and track performance and attendance of participants in financial educational classes, workshops, and resources. Topics and services should be relevant to the All Peoples community. Include a range of topics such as budgeting, savings, credit building, identity theft, property ownership, entrepreneurship, and life planning
- Identify and cultivate relationships with community partners and service providers.
- Identify and connect participants to other resources, services, and partners needed to achieve their financial goal
- Work in conjunction with a sub-contractor agency to implement the VITA program at All Peoples to achieve 400 federal and state tax returns by the end of the fiscal year and provide oversight to make sure the sub-contractor meets all workshop requirements as stated in the contract.
- Other tasks as assigned

FSC Program

- Work in conjunction with case management and housing stability services to serve participants and meet programmatic goals and outcomes. As part of wraparound services, goals, and action plans for participants
- Conduct intakes to enroll clients for FSC services
- Support FSC program in developing a Customer Service Plan that includes a path toward self-sufficiency
- Support FSC program in conducting monthly, one-on-one follow-up meetings and update progress in Customer Service Plans after each session
- Build customer retention and engagement using phone calls, emails, in-person contact and mail to encourage more robust engagement with
- Partner with Emergency Financial Assistance/Supportive Services as they work to provide emergency and supportive needs of households. Financial coaching is required of participants
- Participates in community outreach activities and Special Events year-round, including food and fund distributions
- Other tasks as assigned

Data Management

- Maintain accurate and up-to-date record of all participant contacts
- Prepare and submit all required internal and external reports to the Center and funding sources in a timely manner
- Other tasks as assigned
- Collaborates with Intake/Data entry staff to ensure all documentation is complete and entered into the database
- Maintains frequent contact with clients through appointments and telephone conversations to follow through with programs, services and provide ongoing support
- Completes required program documents and reports with accuracy and attention to detail
- Engages and participates in regular staff meetings and training

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QUALIFICATIONS AND EXPERIENCE REQUIREMENTS

- Bilingual in English/Spanish (spoken and written) is preferred
- Bachelor's degree from accredited college or university or related major
- Preferred background in finance, financial education, or social service field. In the absence of the bachelor's degree, the financial coach must be certified as a financial coach, or be a high school graduate with a minimum of four years demonstrated experience providing financial capability programs
- Must be able to work with diverse populations
- 1-2 years in case management, family service, agency social service experience preferred
- Proficient knowledge of word processing tools and spreadsheets (MS Office Word, Excel, PowerPoint,GSuite, BitFocus) etc
- Ability to work some evenings and Saturdays as needed
- Possession of a car, valid driver's license, satisfactory driving record and proof insurance
- Previous work experience in a financial sector (Banking, Lending, insurance and/or investments is a plus)
- Good communication skills (oral, and written)
- Computer literate

BENEFITS

- 403(b) (employer does not match)
- Pension Plan
- Dental Insurance (100% employer)
- Health Insurance (75%/25% employer/employee)

SCHEDULE

- 8 hour shift/ FTE
- 40 hours per week
- Non-Exempt
- Work Location: 100% In person