



**JOB DESCRIPTION**

Job Title: Financial Empowerment Coach-- Bilingual	FLSA Status (HR): Non exempt
Department Name: Administration	Approved By (HR): Teresa Mooney
Reports to (Title): Chief Operations Officer	Date Revised (HR):
Date Prepared: 6/15/17	Prepared By: Ivy Spadone

**JOB SUMMARY:** The Financial Empowerment Coach is responsible for helping low income families change financial behavior, build assets and become financially stable. This individual will provide high quality, one-on-one financial education and counseling to low income clients of HOPES. This position offers a unique opportunity to a highly motivated individual to develop a financial wellness program at HOPES that leads to improved health outcomes with measurable and quantifiable data points.

HOPES has an integrated team model approach to patient care. Part of the responsibility of the Financial Empowerment Coach will include participation in organization wide Patient Centered Medical Home activities to enhance patient care. As quality is every employee’s responsibility, the Financial Empowerment Coach is required to uphold all standards and policies, and participate in quality improvement processes and meetings.

**ESSENTIAL FUNCTIONS:**

1. Maintain a good knowledge and understanding of Northern Nevada HOPES’ mission, vision, and philosophy and support these tenets at all times while conducting agency business
2. Contribute to a healthy work environment by demonstrating the following: active participation in meetings and team building activities; direct and timely communication about needs and problems at all times and an open and receptive attitude towards proactive problem solving and constructive feedback approaches
3. Maximize learning opportunities by remaining receptive to constructive feedback and utilizing support available from your supervisor
4. Conduct a comprehensive and detailed financial assessment with each client
5. Initiate and develop individual financial care plans, with the ultimate goal of improving financial stability leading to improved health outcomes. Develop plans of actions and provide tools, resources and accountability to the client to help them meet their goals. Monitor client’s progress toward financial goals and care plan.
6. Assist clients in credit and money management counseling which includes resolving client’s budgeting, debt, expense, credit and savings issues and if applicable, residential loan guidance.
7. Provide individualized financial counseling session ( face to face, phone or online) to meet grant outcome goals
8. Track stories and successes of program participants
9. Make appropriate referrals and integrate other wrap around services onsite at HOPES into counseling to achieve greater results.
10. Collaborate with data/IT team to collect, input, track and report results as required. Maintain accurate and up to date files for all participants.
11. Participate in initial trainings and ongoing professional development trainings
12. Pull, review and understand credit reports to assist program clients
13. Conduct workshops as a means of outreach and education to clients and the community. Develop education materials, tailor workshop/education curriculum to the needs of the community. Topics may include budgeting, savings, baking products, credit scores and building, identity theft, etc.
14. Maintain accurate and up to date information of each client’s chart and document client contact using the appropriate/required databases
15. Identify, cultivate and maintain relationship with key community partners
16. Actively practice harm reduction, low-barrier, client-centered management
17. Maintain appropriate professional boundaries with all HOPES clients



18. Adhere to all guidelines related to confidentiality.
19. Assist in the development of monthly reports
20. Represent Northern Nevada HOPES at community meetings, collaborate with other agencies as a part of a continuum of care and serve as an advocate for Northern Nevada HOPES' constituents
21. Develop an oversight committee to include key team members at HOPES. Manage team meetings by establishing agenda and maintaining meeting minutes.
22. Develop quality measures specific to the Financial Wellness program
23. Identify Steering Committee members (including program partners and funders) and schedule quarterly steering committee meetings.

#### **REQUIREMENTS:**

1. A strong understanding of personal finances, particularly in areas of budgeting asset building and credit building
2. Experience building, implementing and monitoring of grant funded programs
3. Experience appropriately handling sensitive and confidential information and situations.
4. Excellent interpersonal and presentation skills
5. Attention to details, self-starter, highly motivated and multitask oriented
6. Excellent communication skills, both oral and written
7. Experience working with diverse populations
8. Possess a current Nevada Drivers License, auto liability insurance and reliable transportation
9. Bilingual Spanish/English
10. Proficiency in Microsoft Word, Excel and Power Point

#### **REPORTING STRUCTURE:**

**Supervision Received:** Chief Operations Officer

**Supervision Exercised:** None

#### **CONTACTS:**

**Internal:** All HOPES staff and clients

**External:** Medical providers, governmental agencies, community members, businesses and other community agencies

#### **JOB QUALIFICATIONS:**

**Knowledge, Skills, and Abilities:** Excellent organizational, counseling, verbal and written communication skills. Ability to take initiative, work independently and balance multiple tasks simultaneously. Team player who is self-motivated, high-energy and enthusiastic. Knowledge of the *harm reduction* model of care. Possess an understanding of substance use and mental health issues in the HIV+ population

**Education or equivalency:** Bachelors degree or formal studies in social work, public health, finance, business administration OR equivalent work experience

**Experience:** Two years of relevant work experience, especially in finance, counseling/coaching or social service delivery

*The above information is intended to describe the most important aspects of the job. It is not intended to be construed as an exhaustive list of all duties and skills required in order to perform the work. The health center reserves the right to revise or change job duties and responsibilities as the business need arises. Additionally, this job description is not intended as an employment contract, implied or otherwise, and the Center*



*continues to maintain its status as an at-will employer. If the essential functions of this position cannot be performed in a satisfactory manner by the employee, reasonable accommodations may be made.*

**EMPLOYEE ACKNOWLEDGEMENT:**

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Employee Name                      Employee Signature                      Date

**SUPERVISOR ACKNOWLEDGEMENT:**

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Supervisor Name                      Supervisor Signature                      Date