



Bilingual Housing and Financial Coach

Position Overview: This position is an outcomes-oriented position, with specific expectations around the number of clients seen each month, the number of clients that achieve increases in net income, net worth and credit score, that receive baseline and follow-up financial assessment and coaching, and provision of the documentation required to corroborate such activities.

The Bilingual Housing and Financial Coach provides direct services to low-to-moderate income individuals. Financial counseling and coaching involve an ability to engage and motivate clients, a strong understanding of personal finances, and the ability to teach that knowledge to others. The Housing and Financial coach is responsible for assisting clients in developing plans of action that are intended to help the client reach their goals and achieve financial stability. The Housing and Financial Coach is expected to focus services in a one on one counseling format and conduct classes and workshops on topics such as budgeting, credit building, and banking products.

Areas of Work:

Housing and Financial counseling/coaching

- Engage clients in a long-term relationship and help clients to understand the value of services offered by the agency, such as employment services and income supports counseling, and connect the clients to these other services
- Assist clients in resolving current housing and financial situations, while providing a wide lens on their financial health to shift the approach to proactive financial management.
- Work with clients to complete a financial assessment
- Partner with clients to co-define agreements and goals, identify assets and strengths, and strategize specific barriers to obtaining financial goals.
- Assess client's financial circumstances and help them identify areas of opportunity to develop financial action plans, including:

Reporting and Outcomes

- Outcome tracking in client management systems as well as track the stories and successes of program participants
- Participate in contractual reporting - Complete all appropriate data entry for coaching clients as well as relevant group trainings and workshops
- Produce monthly and quarterly reports that document all direct service activities and outcomes, and demonstrate the attainment of outcomes through verification paperwork; including financial planning, visioning goals and retention substantiations, and participate in contractual reporting.

Training and Workshops

- Develop, coordinate and facilitate workshops as a means of outreach and education.

Program Planning, Strategy and Coordination

- Lead program planning, strategy and coordination as it relates to housing and financial coaching
- Collaborate with local financial institutions and community organizations
- Participate in the evaluation of all programs and services for overall alignment with CCL's mission and strategic plan.
- In a leadership capacity provide direct support to assigned interns including; onboarding and training for relevant financial & housing tasks, conduct coaching for interns assigned, provide feedback to intern supervisor, assess intern capacity and make task/project workload recommendations.

Working Conditions:

This position requires flexibility in schedule, duties, or unexpected events/circumstances that may occur, so tasks not specified here may be required to successfully execute the position and may be asked upon by the Administration. Occasional evenings, weekends and/or off-site work are required.

Required Qualifications:

- Fluent in Spanish & English
- 5+ years of experience in coaching, direct service, education, financial capabilities, housing counseling, social work and/or advocacy
- Strong strategic-thinking and problem-solving skills.
- Excellent verbal and written communications skills.
- Well-organized, detail oriented with strong documentation and reporting skills.
- Strong computer skills, including fluency with the internet, Google suite, and Microsoft Office applications.

Preferred Qualifications:

- HUD Certification
- Bachelor's Degree in relevant discipline (human service, counseling, community development, social services, sociology, psychology, education etc.).
- Experience working with families
- Experience coordinating a community-based initiative

Accountability: This position is mutually accountable to the broader staff; is supervised by the Director of Program Operations and Strategy, and interfaces with the administrative team on matters of external relations, marketing and resource development.

Salary Range: \$40,000 - \$48,600.

Job Type: Full-time

Benefits Summary: This is a full-time (40 hours a week) exempt position that includes health, dental and vision insurance, life, short-term and long-term disability insurance as well as generous paid time off (4 weeks paid vacation, 7 sick days, 4 personal days, 12 paid holidays). Additional benefits include flexible savings account, commuter benefits, employer matched retirement plan, employee assistance program and sabbatical leave.

To Apply: Submit cover letter and resume to careers@cclconnect.org. No phone calls, please.

Women, people of color, LGBTQ, people with disabilities and veterans are strongly encouraged to apply. CCL is an Equal Opportunity Employer.