



Community Action Marin

Economic Empowerment Program

Job Title: Financial Coach - Bilingual

Reports to: Economic Empowerment Program Director

Job Status: Salaried / Exempt

Job Summary: Community Action Marin is the largest human services provider in Marin County and is designated by the County Board of Supervisors as the “official anti-poverty agency” for Marin County. SparkPoint Marin is a unique program that provides low-income residents with free financial and career coaching and education to support them on their journey to financial self-sufficiency.

The Financial Coach’s time will be devoted to providing one-on-one financial/career coaching to SparkPoint members. All SparkPoint coaches partner with members to help them assess their current situation, create their own goals, identify strategies, create action plans, and ensure that they follow their commitments. Assist clients in accessing all CAM services for which they might be eligible.

Primary Responsibilities

- Provide one-hour first coaching sessions to help new members look at their financial “big picture” and prioritize which specific area they would like to tackle first.
- Provide coaching services at both College of Marin campuses on a weekly basis and carefully track students served for student success study.
- As members continue to access services, provide additional one-hour financial coaching sessions to help them track their progress toward their goals, revisit their long-term goals and priorities, and celebrate successes along the way.
- Maintain orderly and confidential member files and documentation, including detailed case notes, next steps, referrals, and Follow-Up Assessments.
- Record all activities and assessments completely and accurately into the central SparkPoint database for tracking and reporting purposes.
- Translate English program materials into Spanish, and ensure that SparkPoint Marin is meeting the unique needs of its Spanish-speaking members.
- Provide CalFresh application and follow-up assistance to members to increase enrollment among Marin County’s eligible population.
- Provide coaching services on both of College of Marin’s campuses to increase access to financial supports for at-risk students.
- Monitor the overall coach caseload and ensure that individual SparkPoint members are continually engaged and encouraged to continue working toward their goals.
- Support, train, and onboard volunteer coaches.
- Ensure that participants and clients who are no longer engaged in the program are dismissed in a timely manner.

Created: 10/2015
Updated: 10/2017
5/2018
8/2018
1/2019

- Participate in community engagement events and trainings/workshops to expand skill set and increase supports that will promote financial self-sufficiency for the community.
- Work effectively as part of a team.
- Support the Volunteer Income Tax Assistance Program. This includes outreach for tax volunteers and community participants, co-management of tax site operations, and acting as a greeter/intake person.
- Other duties as assigned.

Qualifications

- Bachelor's degree or equivalent work experience
- Bilingual in English/Spanish;
- Commitment to social justice and economic change;
- Strong commitment to the SparkPoint mission and interest in working with low-income people from diverse backgrounds;
- Familiar with the issues faced by individuals and families who are struggling with employment, financial and other life barriers;
- Experience entering and retrieving data from relational databases;
- Strong analytical, time management and organizational skills and the capacity to integrate diverse objectives with a high level of attention to detail and deadlines;
- Skills in problem solving;
- Excellent listening, communication, and facilitation skills;
- Proficiency with computers, including but not limited to, Microsoft Office (Word, Excel, PowerPoint, Outlook), and creating spreadsheets and reports;
- Experience in training and coaching volunteers;
- Experience and/or interest in asset development and financial literacy;
- Ability to maintain confidentiality of sensitive information;
- Deep understanding – and ability to articulate – the role equity, inclusion, and diversity plays in our work;
- CA Driver's License and own vehicle;
- Ability to work flexible hours (including evenings and weekends) as required.

Physical Requirements

- Ability to sit, walk, and stand intermittently
- Ability to grasp, push, and pull objects such as files, file cabinet drawers, and reach overhead
- Ability to operate a telephone and use a computer