



# Community Action Marin

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## Economic Opportunity Program

**Job Title:** Bilingual Financial Services Coordinator

**Reports to:** Economic Opportunity 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. We are working to make Marin a place where all of us can live with dignity and respect and have an equal opportunity to support ourselves and each other. For over 50 years, we’ve been there when our community needed us most. We now offer more support to more people than any other organization in the county, but demand is growing every day.

The Bilingual Financial Services Coordinator assists with the planning, coordination, and implementation of Economic Opportunity Program services including, but not limited to, special events and activities that support financial literacy and education, data collection, employment, and college success. This individual will also co-manage data collection for all SparkPoint services utilizing Exponent Case Management (ECM), a Salesforce-based online data collection system. The Coordinator will serve as the lead financial coaching trainer for financial coaches and will maintain a library of materials and online resources related to financial literacy and education. The individual will work with individuals one-on-one by providing personalized financial coaching and will lead group financial workshops, informational activities, and college class presentations. The Coordinator will assist individuals with accessing and obtaining public benefits and will connect them to employment and training services. Most importantly, the Coordinator will provide a positive experience for community members based on the organization’s shared values of Relationship, Unity, Service, and Inclusivity.

### *Primary Responsibilities*

- Serves as the 1) primary coordinator for SparkPoint coaching services for the Economic Opportunity Director; 2) data collection support for SparkPoint activities, and 3) Financial Coaching Lead/Trainer.
- Supports the Volunteer Income Tax Assistance Program. This includes outreach for tax volunteers and community participants, co-management of tax site operations, and obtaining advanced-level certification to prepare tax returns.
- Exchanges information with clients, staff, other social service agencies, community and business representatives, vendors, governmental agencies and the general public regarding SparkPoint services, eligibility requirements, policies, timelines, required forms and other information
- Travels to various off-site locations to confer with the community college, community service organizations, governmental agencies, businesses and other entities, and to recruit new members.
- Delivers presentations to small and large groups as a program and agency representative.
- Participates in planning and implementation meetings with internal and external stakeholders.

*Created: 10/2015*

*Updated: 10/2017*

*5/2018*

*8/2018*

*1/2019*

*Updated from Financial Coach – 4/2019*

- Plans, conducts, and participates in College of Marin tours, job fairs, and program services in conjunction with management, faculty, and other staff.
- Coordinates logistics and establishes timelines, required materials, online support, facilities, publicity, and other program and event needs.
- Plans joint events with partner agencies and College of Marin.
- Serves as a liaison between the Economic Opportunity Program and all other Community Action Marin and external programs and services.
- Refers clients to community, business, governmental, educational, and other resources to meet their unique needs.
- Conducts follow-up to determine client needs and track progress toward short- and long-term goals.
- Manages and coordinates the work of interns and volunteers.
- Researches and compiles statistical, narrative, financial, demographic and other data for regular and special reports to track program participation, recruitment effectiveness, follow-up, retention, program evaluation criteria, and other information.
- Maintains 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.
- Translates English program materials into Spanish and conducts coaching appointments in Spanish to ensure that the Economic Opportunity Program is meeting the unique needs of its Spanish-speaking members.
- Uses a variety of software to compose, format and prepare correspondence, memoranda, publicity materials, surveys, bulletins, reports, presentations, and other materials.
- Other duties as assigned.

### *Qualifications*

- Bachelor's degree or equivalent work experience;
- Bilingual in English/Spanish;
- Previous experience in financial literacy and/or education;
- Successful experience of increasing responsibility in an educational, financial, social services, human resources, or related area;
- Commitment to social justice and economic change;
- Strong commitment to Community Action Marin's 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 with research, formatting, assessment and preparation of data for reports and other materials;
- Proficiency in using a variety of computer software to track and monitor data, including but not limited to, Microsoft Office (Word, Excel, PowerPoint, Outlook);
- 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;
- Superior listening, communication, and facilitation skills;
- Experience with training and leading the work of others;
- 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 play in our work;
- CA Driver's License and own vehicle;
- Ability to work flexible hours (including evenings and weekends) as required.

*Created: 10/2015*

*Updated: 10/2017*

*5/2018*

*8/2018*

*1/2019*

*Updated from Financial Coach – 4/2019*

### *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

*Created: 10/2015*

*Updated: 10/2017*

*5/2018*

*8/2018*

*1/2019*

*Updated from Financial Coach – 4/2019*