

HAMPTON ROADS WORKFORCE COUNCIL – JOB DESCRIPTION

Job Title:	Financial Opportunity Center Financial Coach
Reports to:	Workforce Initiatives Coordinator
General Classification:	Support
Employment Status:	Full-time, Temporary Grant Funded Position through June 30, 2022, at this time.
Last Review:	May 1, 2021, <i>Subject to change as merger integration evolves.</i>

GENERAL STATEMENT OF RESPONSIBILITIES

This position serves as the Hampton Roads Workforce Council's (Council) Financial Opportunity Center (FOC) Financial Coach and provides or facilitates direct financial coaching and financial education services for low to moderate income individuals who are enrolled as a FOC participants. The FOC Financial Coach is responsible for assisting participants with the development and implementation of a plan of action to help them reach their workforce related goals and achieve and maintain financial stability. The FOC Financial Coach will also work with employment counselors that support the activities of the FOC and assist participants with the application for and obtainment of income support benefits. These benefits may include but are not limited to public benefits such as SNAP, TANF, Social Security, Medicaid, LIHEAP, and more, and other benefits to include EITC and other tax benefits, free eyeglasses and emergency cash assistance, in order to assist participants with the attainment of financial stability. Services will be delivered through a combination of "one on one" and workshop modalities. Two positions are authorized under this position description, one will be primarily housed at the FOC in Norfolk and the other at the FOC in Newport News, Virginia. Work is performed under the general supervision of the Workforce Initiatives Coordinator.

ESSENTIAL JOB FUNCTIONS

- Conduct and document general income support benefits screenings for program participants and assist participants with the application process.
- Maintain contact with program participants throughout their program participation and monitor the status of their income support benefit applications.
- Use the Efforts to Outcome (ETO), a client management system, to document and reflect the outcomes for program participants.
- Conduct a detailed financial health assessment of program participants to be documented and updated on the Combined Financial Assessment (CFA).
- Work with participants in order to develop a budget and balance sheet and assist them with strategies for improvement of their credit scores, net worth and overall financial health.
- Teach participants about the value of FOC services and activities and engage them in a long term relationship which may occur on a "one on one" basis or in a workshop setting.
- Conduct and/or facilitate relevant workshops for program participants.
- Engage subject matter experts to be included in relevant workshops.
- Develop workshop materials and/or tailor existing materials to meet the needs of the participants and community.
- Set agendas and schedule workshops.

HAMPTON ROADS WORKFORCE COUNCIL – JOB DESCRIPTION

- Develop and implement plans of action and provide tools, resources and accountability for participants in order to assist them to meet their goals.
- Work with employment counselors in the implementation of workforce related services and activities in support of participant financial wellbeing.
- Cultivate a strong working relationship with local Departments of Human Services and create and maintain a network of referral organizations within the local community to assist participants with obtaining income support benefits and access to other relevant financial education resources.
- Perform related tasks as needed.

PERFORMANCE STANDARD

Employees at all levels are expected to effectively work together to meet the needs of the community and the organization through work behaviors demonstrating the Board of Directors' Vision, Mission and Values.

REQUIRED KNOWLEDGE

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Occasional travel may be required for business related activities.

SKILLS AND ABILITIES

LANGUAGE SKILLS

- Excellent communications, written and oral, skills.
- Ability to build and sustain relationships, both internally and externally.
- Ability to engage in public roles when interfacing with a wide array of partners.

MATHEMATICAL SKILLS

- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio and percent.
- Ability to develop budgets, read and interpret financials, graphs, etc.

REASONING ABILITY

- Ability to define problems, collect data, establish facts, and draw valid conclusions.
- Ability to deal with a few abstract and concrete variables, exercising judgment, resourcefulness, ingenuity, and initiative.
- Ability to exercise discretion while managing confidential information.

OTHER SKILLS AND ABILITIES

- Computer Knowledge to include: Microsoft Office programs and social media platforms.
- Strong organizational skills and attention to detail.

HAMPTON ROADS WORKFORCE COUNCIL – JOB DESCRIPTION

EDUCATION AND EXPERIENCE

Requires a bachelor's degree in business administration; public administration; counseling; social services; finance; or, related field. One (1) year of related employment experience, with previous work experience in the social services sector or with low income individuals preferred. Experience in the use of computers and administrative software applications to include Microsoft Office 2016; excellent oral, written, and interpersonal skills; internet and resource savvy; strong communication skills; ability to develop and make formal informational presentations in a workshop setting; ability to establish and maintain effective working relationships with others; and, proficiency in the tracking, documenting, compiling and reporting of data.

ADDITIONAL REQUIREMENTS

An acceptable general background check to include a local and state criminal history check and a valid driver's license. Because this position will support regional infrastructure, travel using dependable personal transportation and current auto insurance coverage will be expected. Mileage reimbursement will be provided per agency policy.

PHYSICAL REQUIREMENTS

- Requires the ability to exert light physical effort in sedentary to light work.
- Some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds).
- Tasks may involve extended periods of time at keyboard or work station.

SENSORY REQUIREMENTS

- Some tasks require the ability to perceive and discriminate sounds and visual cues or signals.
- Some tasks require the ability to communicate orally.

ENVIRONMENTAL EXPOSURES

Essential functions are regularly performed without exposure to adverse environmental conditions.