



Job Description

Department:	Family Source Center (FSC)	Location:	Panorama City Area
Job Title:	FSC Financial Coach	Reports to:	FSC Program Manager
Exempt/Non-Exempt:	Non-Exempt	Revision Date:	11/2023
Position Type:	Full-Time (40 hrs./week)	JD Approved by:	Lizz Diaz
Pay Range	\$22 - \$23	Apply at:	tanias.f@ecda.org

Job Description

Position Summary

The FSC Financial Coach reports to the FSC Program Manager and provides intake, assessment, case management and financial coaching services for individual clients and their families for the Panorama City FSC. The position provides coaching and support services to low-income individual clients and families. The position ensures that efficient and sound plans are developed with consumers and inputs all necessary data and documentation into the Program's and Agency's electronic record keeping and data system(s). The end goal of the Financial Coach is to foster greater economic self-sufficiency in individuals and families. The position will engage individuals and families to uncover their unique challenges and needs as well as their strengths and resources to enable the client to set their own goals. This position requires in-person work attendance daily as well as fieldwork. Other duties as assigned.

Role and Responsibilities

- Provides intake and financial well-being assessment and comprehensive case management to consumers that need support in financial coaching.
- Identifies client's specific needs related to financial coaching.
- Work with clients on budgeting, analyzing saving plans, reducing debt, assessing delinquency issues, explore debt-to-income ratio and rent-to-income ratio, improving credit score and financial well-being,
- Ensures clients receive services which include emergency food, emergency funds for housing related expenses, housing related legal assistance, and technology support for students.
- Develops individualized plans to address client's/families' needs, including need for legal services, housing, financial coaching, employment educational, health, mental services, immigration, and other services.
- Connects and links client/family to FSC programs and activities, other ECDA services, and community resources to assist with meeting goals of improving Family Income and Academic Achievement
- Assist with Child Watch and food bank duties.
- Connects families to Housing Stability Advisor and works in collaboration to assist families in maintaining/securing safe and affordable housing.
- Participates in meetings with other team members and supervisor to debrief on progress on cases and troubleshoot challenges that may arise.
- Meets and maintains caseload productivity requirements to meet program contract objectives.
- Participates in community outreach activities, special events and projects year-round, including food and fund distributions.
- Oversees and cultivates relationships with specific internal and external partnerships and programming activities.
- Maintains frequent contact with clients through appointments at the FSC and telephone conversations to follow through with programs, services and provide ongoing support.
- Works with identified collaborative internal and external partners.
- Engages and participates in regular staff meetings and trainings.
- Leads or facilitates group, consultations, in-services, events, meetings, and activities.
- Initiates crisis intervention when crisis related incidents occur with clients or families at FSC.
- Completes required documentation, assessments, reports, referrals and data entry with accuracy and attention to detail onto specified Agency and FSC record keeping/data systems by required deadlines.
- Adheres to agency and programmatic deadlines.
- Participates in FSC team meetings, events, staff meetings, collaborative partner or community meetings and other meetings as requested.
- Assist with special projects as needed.



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Qualifications and Education Requirements

- Bachelor’s degree in finance, accounting or related field **or** be certified as a financial coach **or** a high school diploma with a minimum of four years demonstrated experience providing financial capability programs.
- Experience providing services to vulnerable populations preferred.
- Ability to work with people from diverse ethnic groups and various socioeconomic levels.
- Bilingual (English/Spanish) with excellent oral and written communication skills.
- Must have great organizational skills, be detail oriented and a self-starter with the ability to multitask.
- The ideal candidate should be personable and have experience in the social services field with familiarity in the mental health field.
- Candidate needs to be motivated and able to communicate effectively, and efficiently, both verbally and in written format.
- Strong computer literacy including Microsoft Word, Excel, Access, Adobe PDF, Outlook, Google Drive, Internet, and other standard equipment.
- Must clear HIPAA certification, Department of Justice, and TB clearance.
- Occasional weekend and evening hours will be necessary.
- Must have a reliable vehicle/access to transportation, valid California driver’s license, and be responsible for all liability on vehicle.
- Required to work “In-Person” and in dedicated or assigned site(s), and in the community on weekdays and some nights and weekends.
- Other duties as assigned.

Preferred Skills

Comment

Candidates must be able to work effectively with their team and Manager, demonstrate adaptability, and can accomplish program goals and objectives. Candidates should demonstrate empathy, courtesy, interest, and a willingness to adhere to safety rules, as well as computer, email, Internet, and dress code policies. Must have valid California driver’s license and use of personal vehicle that has liability car insurance. Candidates will receive their required BBS supervisory ratio for client services provided.

The benefits of joining the ECDA team include health insurance, vision, dental, long-term disability, AD&D, life insurance, vacation, sick leave, paid holidays, jury duty, bereavement, and 401K matching.

All employees must demonstrate an understanding, patient, and receptive attitude toward individuals of varied age groups, behaviors, and varied disabilities. Employees must have the ability to maintain composure under stressful conditions. Staff must be able and willing to work with clients who have special needs and/or aggressive behaviors (i.e., biting, kicking, hitting, emotional outburst, etc.). Staff must have behavior management strategies and techniques relating to clients experiencing behavioral difficulties, positive behavioral interventions and applied behavioral analysis.

El Centro de Amistad provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics. In addition to federal law requirements, El Centro de Amistad complies with applicable state and local laws governing nondiscrimination in employment at every company location. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.

Acknowledgment

By signing below, I acknowledge that I have read and understand the position description for this position, including the working conditions listed below. I feel I am qualified to perform the position duties as described, including the physical and mental requirements as outlined.

By signing below, I feel I am qualified to perform the position duties as described with the following reasonable accommodations:

Employee Name:

Date:

Employee Signature:



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Physical Demands:			
	FREQUENTLY	OCCASIONALLY	SELDOM
Sitting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lifting 50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Carrying	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Squatting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pushing/Pulling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Seeing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fine Finger Movement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Demands:			
Outside:	Ability to spend 20% of work time outside		
Inside:	Ability to spend 80% of work time indoors		
Noise:	Ability to withstand moderate to high noise levels, including voice levels 90% of time		
Heat:	NA		
Cold:	NA		
Electric Equipment:	Ability to operate office equipment, computer, copier, and cellphones		
Work with Others:	100% of time spent working and interacting with team and other departments		
Reading	Ability to read at a college level		
Writing	Ability to write at a college level		

Disclaimer: The above statements are intended to describe the general nature and level of work being performed by staff members assigned to this job. It is not designed to be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of the staff member assigned to this job.

To apply or any questions, please email Tania Fallert at tania.f@ecda.org.