



IMPACT Community Action Job Description

Title: Financial Literacy Coordinator

Job Summary: Develops, coordinates, and leads the implementation of a programs/service delivery system addressing the barriers to financial self-sufficiency. Provides programs/services available to clients to ensure their success in achieving self-sufficiency.

Reports to: Program Manager

Job Duties: *Job Duties listed represent the major responsibilities for the job. Each specific position within a job title may require more specific duties, processes, skills, or assignments. Other duties are assigned on an as needed basis and may require additional skills and competencies.*

- The Financial Literacy Coordinator will assist the Financial Literacy Manager with the following:
- Identifies the major barriers to financial self-sufficiency, determines effective solutions to barriers, and creates programs that offer solutions to eligible customers.
- Develops and implements an intake process, assesses clients' barriers and goals, and makes appropriate referrals to internal and external programs/services.
- Provides direct service to eligible clients as prescribed in the department's work plans.
- Administers the client progress tracking system to ensure clients receive the support they need and that all program activities are logged respective to their funding source.
- Develops and implements programs and presentations that are effective in helping clients understand and utilize the tools for obtaining financial self-sufficiency.
- Identifies, evaluates, and incorporates into the financial services programs new and innovative programs/processes that have been effective in providing self-sufficiency.
- Maintains current knowledge and necessary certifications to best serve clients in their journey to financial self-sufficiency.
- Maintains a positive and productive relationship with IMPACT's partnering agencies, internal customers, and clients.
- Motivates clients to take control of their financial well-being.
- Enters data into OCEAN and other tracking tools, issues reports, and maintains files for all client services.

Working Conditions and Physical Requirements:

Standard office environment. Requires ability to operate telephone and personal computer for extended periods of time. Occasional travel. Occasional flexibility with work schedule per program needs.

Competencies and Knowledge, Skills, and Abilities:

- Integrity and Trust
- Action Oriented
- Drive for Results
- Interpersonal Savvy
- Self-motivated
- Problem Solving
- Process Management
- Customer Service
- Innovation
- Motivator
- Empathy
- Verbal, Written Communication Skills
- Detail Oriented
- Technical Skills (e.g., PC applications)
- Functional Knowledge and Skills – examples:
 - individual financial budgeting and planning
 - knowledge of related services for individual and family support
 - knowledge of current income tax law

Minimum Education and Qualifications:

Associate Degree in personal finance, finance, social work, or related field or equivalent knowledge/experience.

Two years experience in a position with responsibility for providing and/or coordinating supportive services to help individuals reach their goals.

Must possess a valid Ohio Driver's license and/or reliable transportation. Must comply with agency's insurance carrier standards and policy.

Preferred: Experience in providing personal financial training/counseling.

Equal Opportunity Statement:

IMPACT Community Action recognizes that a diverse workforce enhances the organization in many ways. We are committed to providing equal employment opportunities that foster diversity and meaningful experiences.

Revised: January 2019