

THE RESURRECTION PROJECT

Job Description



Position Title	Financial Coach (Full-Time)
Supervisory Relationship	TBD
Work Location	TRP/Partners locations as needed
Organization General Description	<p>The Resurrection Project (TRP) is a 501(c)(3) community development organization. Founded by a coalition of Pilsen churches in 1990, The Resurrection Project's mission is to build relationships and challenge people to act on their faith and values to create healthy communities through organizing, education and community development. The organization primarily serves low and moderate-income families in Pilsen, Little Village, Back of the Yards and Melrose Park.</p>
Pillar Purpose	<p>TRP's Community Wealth Building Pillar builds financial empowerment and lays the foundation for economic vitality so individuals and business owners can directly invest in the community and have a visible stake in its destiny. Individuals and families are placed on the path of financial stability through financial coaching, homeownership education, and foreclosure prevention. TRP was recently designated as a Community Development Financial Institution (CDFI).</p>
General Job Description	<p>The Financial Coach is responsible for assisting with the implementation of financial empowerment initiatives and one-on-one financial coaching. The Financial Coach helps community members create a financial plan that includes the establishment of financial goals, improvement of credit, savings and debt, and access to financial products.</p> <p>The Financial Coach is a member of the Financial Wellness department and the Community Wealth Building Pillar and works with other staff to further TRP's mission through the promotion of financial capability, sustainable homeownership, and wealth building.</p>
Job Duties and Responsibilities	<ul style="list-style-type: none">• Provide one-on-one financial coaching services and contributing to meet. Comprehensive one-on-one financial coaching and analysis for individuals looking to improve their financial wellness and financial security. The analysis includes review of credit, debt, savings, budgeting, financial goal setting, the access to financial products, and the development of a financial action plan.• Cultivate, manage, and expand relationships with participants, leaders, TRP member institutions, and partners to promote and further TRP's Financial Wellness goals and organizational mission.• Recruit community participants.• Maintain accurate data and reporting systems in TRP's new Salesforce CRM to effectively track client and program progress; adhere to all guidelines related to confidentiality of files and records.• Work closely with other Financial Wellness staff to enhance and further develop current courses and expand services provided.• Cultivate, manage, and expand relationships with participants, leaders, TRP member institutions, and partners to promote and further TRP's Financial Wellness goals and organizational mission.• Maintain required job skills, core professional competencies and certifications.• Attend and participate in required educational programs and staff meetings.• Performs other duties as assigned.

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Performance Measures	<ul style="list-style-type: none">• Achievement of annual clients-served goal and coaching goals.• Achievement of initial, six-month, and annual client financial follow-up.• Compliance of Certification/Training/Education - Staff Development requirements.• Data entry and data integrity (intake, integrity, tracking) into CRM.• Improve customer service and assess regularly customer satisfaction.• Increase Outreach (increase visibility of TRP).• Increase Networking (identifying new business opportunities, collaborations, and relevant products).• Active collaborations (Projects, grants, fee for services programs, and partners).• Ensure consistency, integrity and timely delivery of internal and external reporting and communications.• Active participation in required staff and team meetings and programs.
Essential Knowledge and Skills	<ul style="list-style-type: none">• Bachelor's Degree is preferred.• Two years' experience in housing counseling, community development, finance, real estate, social work or related field required.• Certification from HUD/NeighborWorks/UnidosUS in Financial Capability within one year of hire.• Bilingual in English and Spanish required.• Demonstrated ability to build relationships and work effectively with people of diverse social, faith, economic, and racial/ethnic backgrounds.• Proficient knowledge of MS Office and Internet required; Salesforce preferred.• Highly motivated and demonstrated ability to work independently as well as part of a team.• Attention to detail.
Special Working Conditions and Demands	<ul style="list-style-type: none">• Willingness to work flexible hours as needed; evenings and weekends required.• Access to a car, valid driver's license, and ability to travel within the metropolitan area and sometimes out of state.
Position Classification	Full-Time, Non-Exempt
Preparation Date	4/8/19
Statement of Equal Opportunity	The Resurrection Project is an equal opportunity employer and does not discriminate based on race, color, religion, sex (including pregnancy), national origin, ancestry, age, marital status, sexual orientation (including gender identity), military status, disability, language (any language use not related to job duties), or any other status protected by applicable federal, state, or local law.
Application Instructions	Please send resume and cover letter by email or mail. No phone calls please.
Contact Information	Email: trpjobs@resurrectionproject.org Mail: Human Resources, 1818 South Paulina, Chicago, IL 60608
Last Revised	4/8/19