

# THE RESURRECTION PROJECT

## Job Description



<b>Position Title</b>	Financial Wellness Coordinator
<b>Supervisory Relationship</b>	Financial Empowerment Manager
<b>Work Location</b>	Mexican Consulate of Chicago, 204 S Ashland Ave.
<b>Organization General Description</b>	<p>After 28 years and an initial seed capital of \$30,000 from area parishes, The Resurrection Project (TRP) has grown to become a powerful and effective social enterprise that seamlessly blends community development, community organizing, and advocacy with human service delivery to create vibrant, healthier, and involved communities. Our efforts have resulted in leveraging more than \$500 million in community investment.</p>
<b>Pillar Purpose</b>	<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, foreclosure prevention, and access to affordable and appropriate financial products. TRP was recently designated as a Community Development Financial Institution (CDFI).</p>
<b>General Job Description</b>	<p>The Financial Wellness Coordinator is responsible for implementation of financial capability programming including financial education workshops and financial coaching for the Ventanilla de Asesoría Financiera (VAF) at the Mexican Consulate in Chicago. Main duties include the organization, implementation, and expansion of financial education workshops at the Consulate; tracking all participation; development of educational programs; marketing and outreach; and building relationships with industry professionals and partners. The Coordinator will act as liaison between TRP and the Consulate's staff.</p> <p>The Financial Wellness Coordinator 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>
<b>Job Duties and Responsibilities</b>	<ul style="list-style-type: none"><li>• Oversee the Ventanilla de Asesoría Financiera (VAF) program implementation and execution. The VAF is an initiative that brings financial capability services to the Mexican Consulate of Chicago.</li><li>• Responsible for the day-to-day activities of the VAF staff, including, but not limited to:<ul style="list-style-type: none"><li>○ Staff recruitment and selection; Scheduling and job assignments; Development and training; Performance evaluation; Recommendation for salary increases</li><li>○ Disciplinary and other personnel actions in accordance with relevant TRP policies and procedures</li><li>○ Serve as a liaison between TRP and the General Consulate</li><li>○ Coordinate organizations within the partner network at the VAF.</li><li>○ Participate in regularly scheduled meetings and/or conference calls between TRP and the General Consulate</li><li>○ Train General Consulate staff on TRP programs and services</li><li>○ Oversee data integrity and outcome/goals accomplishment</li><li>○ Generate, complete, and submit reports as assigned and required by the General Consulate and others</li></ul></li><li>• Provide one-on-one financial coaching services (60% of time)<ul style="list-style-type: none"><li>○ Comprehensive one-on-one financial coaching and analysis for individuals looking to improve their financial wellness and financial security. The analysis</li></ul></li></ul>

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includes review of credit, debt, savings, budgeting, financial goal setting, the access to financial products, and the development of a financial action plan.

- Enter and maintain data in Salesforce CRM and any other designated database to effectively track progress of participants.
- Develop individualized action plans with one-one-one coaching clients.
- Recruit community participants.
- Facilitate financial education workshops (approximately 20% of time).
  - Assist and support in the development and implementation of educational programs and workshops. Facilitate workshops for the community and Consulate's constituents on various financial topics
- Look for opportunities and lead the integration of Financial Wellness and other TRP Pillars with the VAF. Coordinate with other TRP staff to schedule workshops and appointments, and assist participants seeking additional services.
- Cultivate, manage, and expand relationships with participants, leaders, community-based institutions, and partners to further TRP's Financial Wellness' goals and the organization's mission.
- Maintain required job skills and core professional competencies.
- Attend and participates in required educational programs and staff meetings.
- Perform other duties as assigned.

### Essential Knowledge and Skills

- Bachelor's Degree is preferred. Three years' experience in housing counseling, financial education, community development, banking, real estate, social work or related field required.
- Experience in workshop development and adult education, teaching, and/or counseling; Certification from HUD/NeighborWorks a plus.
- 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.
- Excellent verbal, analytical, writing, and organization skills.
- Demonstrated public speaking skills.
- Proficient knowledge of MS Office and Internet required; Smartsheet and Salesforce preferred.
- Experience using a client management database, specifically Salesforce, is a plus.
- Highly motivated and demonstrated ability to work independently as well as part of a team.
- Attention to details.

### Position Classification Preparation Date

Full-Time, Exempt  
12/17/18

### Statement of Equal Opportunity

The Resurrection Project is an equal opportunity employer and does not discriminate on the basis of 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](mailto:trpjobs@resurrectionproject.org)  
Mail: Human Resources, 1805 South Ashland, Chicago, IL 60608  
To learn more about The Resurrection Project, please visit [www.resurrectionproject.org](http://www.resurrectionproject.org)

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