



JANE
ADDAMS
RESOURCE
CORPORATION



Jane Addams Resource Corporation- Rhode Island Job Description

Title: Financial Coach
Department: Jane Addams Resource Corporation- Rhode Island
Program: Careers in Manufacturing Programs
Reports to: Site Director – Rhode Island

The Jane Addams Resource Corporation (JARC) promotes strong communities, businesses and households to ensure that people who work do not live in poverty.

JARC helps low-income workers, job seekers and community residents attain financial self-sufficiency through skills training and support services. JARC's training programs target middle skills gaps in the manufacturing sector, such as Computer Numerical Control (CNC) machinist, additive manufacturing and robotics, and serve a variety of populations:

- *Careers in Manufacturing Programs (CMP) – Provides job training and employment services to a variety of adult job seekers, including dislocated workers and job seekers with barriers to employment.*

Essential Duties and Responsibilities:

- Provide individual financial counseling and coaching as a part of JARC's financial opportunity center and its broader CWF strategy
- Assess clients' financial situations by reviewing clients' credit reports, budgets, balance sheets and other financial documents
 - a. Complete a Combined Financial Assessments (CFA) for every client
 - b. Assist clients in developing realistic spending, savings, and debt management/ reduction plans
 - c. Recommend strategies for clients to establish or reestablish credit and/or increase assets (Retirement, Home, Education, etc.)
 - d. Review and record changes in clients' credit scores, income and net worth to determine whether changes to existing debt management plans, spending plans, or budgets are needed
- Maintain physical and digital tracking of client interactions, communications, financial activity, and progress on goal attainment
 - a. Documents outcome tracking through Salesforce, Excel, and other data systems as needed
 - b. Ensures physical and electronic documentation meets grant requirements and organization standards
- Negotiate with creditors on behalf of clients to arrange for payment adjustments, interest rate reductions, time extensions, settlements or to set up payment plans
- Facilitate financial education classes and workshops

- Develop relationships with local financial institutions, and create and maintain a network of referral organization to assist clients experiencing, bankruptcy, foreclosure, repossession, tax liabilities, civil judgments, etc.

Team Functions:

- Participate on the Training Services Team, the FOC Team, and other departmental meetings
- Collaborate with the Adult Learners Program, Business and Workforce Services, and the Training Instructors
- Assist with required monthly, quarterly, and annual reports
- Write success stories about clients and obtain their feedback on JARC's services
- Comply with all funder requirements
- Other duties as assigned

Requirements/ Qualifications:

- A minimum of a Bachelor's Degree or a minimum of three years of related experience.
- Able to prioritize organization of hard and electronic files to meet funder requirements and uphold agency's high standards
- Strong written and verbal communication skills
- Two or more years of experience in the financial or credit counseling industry preferred
- Intermediate level skills of Microsoft Office and Salesforce preferred
- Working knowledge of the Rhode Island area manufacturing industry a plus
- Experience in workforce development and/ or nonprofit (particularly familiarity with the CWF model of bundled services and financial coaching) a plus.
- Bilingual a plus.
- Flexible Schedule.

Terms/ Conditions:

- Full Time (35 hours a week)
- FLSA non-exempt
- Some evening hours required
- Criminal Background Check Required

Compensation:

- \$21.98 per hour
- We offer a competitive benefits package, including Medical, Dental, Vision, 403B, Life, LTD Disability, Paid Holidays, and generous Paid Time Off

**Submit cover letter and resume to hr@jane-addams.org. No phone calls please.
Please include the position title Financial Coach within the subject line. Inquiries without the title in the subject line are not able to be received.**

*Jane Addams Resource Corporation is an Equal Opportunity Employer
Minority/Female/LGBTQ/Gender Identity/ Veteran/Returning Citizen/ Disabled
*All Are Encouraged to Apply**