Position Title:	**Financial Success Center Case Coach**
Reports to:	**Director, Community Impact**
Supervises:	**N/A**
Exempt Status:	**Exempt**
Date:	**November 2016**

Value Proposition
We connect all segments of the community toward achieving the goal of producing healthy, well-educated and economically stable individuals and families. We accomplish our work through community engagement, community development and capacity building.

Our Mission
United Way of Pioneer Valley mobilizes people and resources to strengthen our communities.

Our Vision
We envision a thriving, caring region where individuals have opportunities to realize their human potential, are economically self-sufficient and contribute collectively to improve the quality of life in their communities.

Our Core Values
Values represent the core priorities in our organization. They establish the way in which we make decisions and evaluate our progress. We value:

- **Accountability**
  - Transparency and fairness in all of our relationships, instilling the highest level of public trust in our efforts;
- **Creativity**
  - Continuous improvement and innovative approaches to improving the community;
- **Diversity**
  - The dignity, worth and uniqueness of every individual;
- **Excellence**
  - Providing the highest quality of service in achievement of our goals with clear and measurable outcomes;
- **Relevance**
  - Clear identification of our value to the community using data driven and community engagement strategies.

Summary of Position: The Case Coach position offers a unique opportunity for a highly motivated individual to work in a growth-oriented program in both downtown Holyoke and Westfield. The Coach plays an instrumental role in the Financial Success Center (Thrive) by working with low to moderate income participants to change financial behavior, build assets, and become financially stable. He/she will work with each client to create an individualized action plan designed to reach target goals including credit score, budgeting, saving, and asset development, among others. The Coach will maintain regular contact with the client to assess progress and provide encouragement to adhere to the plan or make adjustments as necessary. While the Coach will provide some financial coaching, he/she will also connect clients to the appropriate Thrive partners such as workforce development, the Volunteer Income Tax Assistance (VITA), and the Department of Transitional Assistance to ensure that all available resources are accessed by the client. The Coach will ensure that points of contact with clients are documented in the Efforts to Outcomes (ETO) system or other software identified to track progress.

Key Responsibilities and Specific Duties:

- Full review of client's intake/assessment form
- Engage with a client one-on-one relative to their personal financial goals including: reducing debt, improving credit, working within a budget, saving for emergencies, and building assets. Work with the client to develop a plan of action intended to help the client reach his/her goals and achieve financial stability
- Provide tools, resources, and accountability to help the client meet his/her goals
- Ensure that the client is aware of access to income supports and has applied if interested
- Ensure that client is aware of workforce development services and has enrolled in appropriate programs as outlined in the action plan
- Understand other services offered by the Thrive and elsewhere, and connect the client to those services as needed
- Use questioning techniques to encourage the client to identify solutions and actions and take a proactive approach to financial management and stability (coaching technique)
- Maintain regular contact (e.g. at least monthly) with clients and keep them motivated to adhere to their action plan
- Use Efforts to Outcomes (ETO) or other identified software to document client's progress
- Develop workshop materials as necessary
- Work with mainstream financial institutions to learn about options for Thrive clients
- Contribute feedback to the Thrive team, including trends noticed among clients' needs, new resources, etc.
- Provide support, as needed, to other core programs including cross-training in other Center service areas

- Must attend initial coaching training session and other trainings as offered through the Center site manager

Position Skills and Qualifications

- A bachelor's degree from a 4-year accredited institution
- A strong understanding of personal finances, particularly in the areas of budgeting, asset building, and credit building
- A strong sense of team
- The ability to provide financial coaching services in a culturally sensitive manner
- Bilingual in Spanish helpful
- Excellent interpersonal, written and verbal communication skills
- Ability to tailor-fit an action plan to a particular client's needs
- Creative, practical and strategic problem solving skills
- Ability to adapt coaching methods and tools to create more effective organizational and client outcomes