

SEVCA JOB DESCRIPTION

Program: Economic Development

Job Title: Financial and Energy Coach

Pay Grade: Exempt

Last Review Date/Update/Change of Job Description: August 3, 2021

A. General Statement:

The Financial and Energy Coach works with individuals and families to increase financial wellbeing and self-sufficiency around credit building, debt reduction, saving strategies, and budgeting through 1:1 counseling/coaching and group classroom training. At the center of the financial coaching program will be an emphasis on providing clients the tools and resources to help them make purchasing decisions and home improvement investments that reduce their reliance on carbon technologies such as purchasing incentives, tax credits, rebates, and other money saving opportunities. Coach will perform energy usage assessments with clients in a streamlined process to ensure statewide consistency and make referrals as identified through this process. The coach reports to the Director of Economic Development and is part of the Economic Development Team.

B. Essential Functions:

Training and Counseling

1. Collaborate with and provide guidance to participants in person and on-line to help them reach their financial goals while identifying opportunities to reduce their reliance on carbon-based technologies. Provide support, encouragement, accountability, and tools to help people with limited resources make informed personal financial decisions that also contribute to a reduction in energy consumption.
2. Train for the Association of Financial Counseling and Planning Education (AFCPE) Accredited Financial Counselor accreditation and the Sage Financial Fitness Coach accreditation in the first six months.
3. Have knowledge and experience with: budgeting, credit building, debt reduction, savings, student loans, and general personal money management.
4. Follow the coaching process as designed by the statewide program to ensure
5. Understand social service safety nets such as 3SquaresVT, Reach Up, and other government subsidy programs and use discretion when making outside referrals.
6. Design, oversee, and implement financial education classes that incorporate information about energy consumption and the cost of energy usage in a family budget

Outreach

1. Market the Financial and Energy Coaching Program for people who are interested in reducing their energy consumption and to serve as a basis for policy development and advocacy at a state and national level.
2. Partner with departments in the agency to integrate financial capability programming, into housing, weatherization, Food Security, and Head Start programs.
3. Create blogs, newsletter articles and other written communication for local media and social media related to program activities. Update and create content for website page
4. Represent SEVCA at events.

Program Partnerships

1. Maintain positive relationships with individuals, organizations and institutions contributing to the training and counseling of participants.

Administration

1. Evaluate participants' progress in the financial coaching program through the use of the management information system and provide reports to Program Coordinator (based at CAPSTONE) and SEVCA ED Dept. Director.
2. Coordinate program evaluations and provide feedback on Program's operations and efficacy.

C. Other Duties:

1. Pursue educational opportunities and training that further professional development.
2. Participate in the Economic Development Team.
3. Complete all required employee evaluations.
4. Other duties as assigned.

D. Desired Qualifications:

1. B.A. or higher degree, preferably in community organizing, community development, financial management, planning, or human services, or an AA and nationally recognized accreditation in Financial Counseling or Financial Coaching. Two years relevant experience can be substituted for a BA.
2. Commitment to or passion for reducing the effects of climate change on marginalized communities in Vermont.
3. Excellent written and oral communications skills.
4. Experience in group facilitation and training.
5. Experience with coaching, counseling or similar 1:1 direct service.
6. Experience in marketing and public relations or community outreach desirable.
7. Proficiency in Microsoft Office products and database management systems.
8. Strong financial counseling and coaching and credit building skills desirable, or an interest in personal finance.
9. Demonstrated proficiency in financial management and the skills necessary to work with clients on personal finance.
10. Demonstrated sensitivity to the challenges faced by people living with low incomes.
11. Demonstrated ability to represent the agency, work as part of a team, and under direction.
12. Must have reliable transportation and valid driver's license, and be able to work a flexible schedule including evenings and weekends.

E. Signatures:

Employee: _____ Date: _____

Supervisor: _____ Date: _____

Program Director: _____ Date: _____