

DALLAS LEADERSHIP FOUNDATION

Position Description Summary

Title: Financial Literacy Coordinator

Department: DLF Neighborhoods

Location: Downtown, Dallas

Reports to: DLF neighborhoods Director

About the Dallas Leadership Foundation: The Dallas Leadership Foundation is a Christian not-for-profit organization that develops local leaders to affect long-term change in underserved communities.

Job Summary:

Under the supervision of and working directly with the DLF Neighborhoods Director, the Financial Literacy Coordinator is the principal staff member responsible for strategy to provide comprehensive financial literacy and training services to DLF clients. The Financial Literacy Coordinator will be dedicated to helping low to moderate income families change financial behavior, build assets and become financially stable. The Financial Literacy Coordinator provides individualized financial coaching for participants to help them reach target goals including credit score; budgeting; saving; utilization of quality financial services; and asset development. The Financial Literacy Coordinator will work directly with organizations, families, and individuals that participate in DLF programs to ensure that participants reach their educational, financial, and asset goals.

Specific Duties and Responsibilities:

- **Financial coaching:** Provide one-on-one coaching for participants in Dallas Leadership Foundation's financial literacy programs. Assist participants with goal setting, budgeting, credit building/rebuilding, debt repayment, savings, utilization for quality financial services, and asset development. Monitor participant progress toward financial goals. Follow up with participants on referrals to other financial service professionals when applicable. Maintains files and database for all participants including the intake form, credit report, coach's appointment notes, analysis and corrective action plan.
- **Financial Navigators:** Create and deliver trainings that develop Neighborhood, Youth and Re-entry Coaches. The Coaches will come from the communities they serve and will support the financial literacy goals developed by DLF Staff and the local community. This position will identify needed coaching resources and support for Financial Navigators.
- **Financial education classes/workshops:** Develop and conduct financial education classes. Oversee participant performance at onsite financial education classes.

- **Data collection and evaluation:** Collect and verify all required data from participants throughout the program, including Combined Financial Assessment and Financial Profile. Assist in program reports preparation
- **Resource development:** Identify and refer participants to other resources and services needed to achieve their financial goal. Identify, cultivate, and maintain relationship with key community partners.
- **General program support:** Provide support, as needed, to other core programs including cross-training in other service areas. Assists with special projects as assigned and other tasks deemed necessary to achieve overall goals and to operate a successful program.
- **Policy and Guidelines:** Adheres to all guidelines related to confidentiality. Follow regulatory and quality-control requirements. Works to ensure that satisfaction is a priority of the coaching program.
- **Travel:** Travel for training and occasional meeting as needed.
- Maintain a flexible work schedule as needed.

Qualifications:

Successful candidates for the position of Financial Literacy Coordinator are expected to possess the following qualities and attributes:

- Highly motivated self-starter.
- A mature Christian with experience in ministry service, either full-time or in a volunteer capacity.
- Understands and practices principles of Biblical equality dealing with class, race and gender.
- Computer literate, able to navigate software programs, databases, and office equipment.
- Strong verbal, writing, interpersonal, and analytical skills.
- Demonstrates ability to interact effectively and confidently with individuals at all social and economic levels that utilize or support DLF services.
- Ability to work independently and as a productive team member.
- Detail-oriented, with a willingness to learn new skills and techniques to promote quality, efficiency and successful customer outcomes.
- Ability to sense when clients are overwhelmed and to deliver major objectives in manageable steps.
- Dedicated individual to engage/motivate/encourage clients and help them resolve financial challenges and accomplish goals.
- Creative, practical and possesses strategic problem-solving skills.
- Flexible work schedule to include some evenings and/or weekends as needed
- Must possess an undergraduate degree.

- Must have at least two years of experience in Financial Literacy coaching or training
- Able to organize, prioritize, and work well with others.
- Must have valid driver's license and dependable vehicle

In addition to outlined performance measures, every employee will be evaluated on the subsequent criteria:

- **Communication:** convey information and instructions both orally and in writing
- **Teamwork:** participate in building consensus decision-making efforts
- **Job Aptitude:** perform assigned tasks
- **Job Attitude:** show motivation for the job