

Job Title: Senior Manager of Financial Coaching

Organization & Mission

Founded in 2005, Compass Working Capital (“Compass”) is a nonprofit organization that supports low-income families to build assets and financial capabilities as a pathway out of poverty. More broadly, Compass seeks to build a leading, nonprofit financial services organization that promotes economic mobility and financial security for low-income families by influencing field-related practice and policy.

Over the last seven years, our focus has been the launch and expansion of an innovative, new model for the Family Self-Sufficiency (FSS) program, a historically underutilized employment and savings program for families who live in federally subsidized housing. The first program of its kind in the country, the Compass FSS program is offered through partnerships with multiple housing partners in Massachusetts, Connecticut, and Rhode Island.

Building on the success of our local programs in New England, Compass launched a national network in 2016 to help expand the scope and impact of the FSS program around the country. Through this network, Compass provides training and technical assistance to mission aligned housing partners who seek to implement the Compass FSS model in their own communities. The Compass FSS program continues to attract local and national attention as an innovative model that supports low-income families to build assets, achieve their goals, and make progress toward financial security.

In addition to our flagship FSS programs, we also provide contract-based financial coaching programs for other organizations that serve low-income families.

For more information, please visit www.compassworkingcapital.org

Position Description and Responsibilities

The Senior Manager of Financial Coaching will have two primary areas of responsibility: 1) develop, refine, and codify standards for core Compass financial services content across all of our programs, including personal finance curriculum, tools, resources, and, methodologies, and 2) develop and implement financial coaching training curriculum and technical assistance resources for our national network partners. The Senior Manager of Financial Coaching will work in close partnership with the Director of Financial Services and the Director of National Impact to ensure the integration and alignment of financial services content and training across our local and national sites.

Primary areas of responsibility include:

- *Build and develop financial services content, tools, resources, and methodology*
 - Review, refine, and codify set of standards for core Compass financial services content, including goal setting, budgeting, credit building, saving, and home buying to strengthen overall program impact and client satisfaction
 - Collaborate with instructional design consultant and/or staff to develop content
 - Develop and oversee all resource guides, including client facing resources and practitioner focused resources.
- *Provide technical support to financial coaching team.* Provide expert support and consultation to financial coaching team on personal finance topics, including consultation as needed on individual clients.
 - As needed, develop referral partnerships and/or recruit and oversee contractors for specialized client services
- *Develop and review content, structure, and impact of core financial education workshops and specialized workshops.*
 - Oversee curriculum for core financial education workshops and develop, as needed, curriculum for specialized workshops

- Assess feasibility of, and/or determine plan for, utilizing volunteers to deliver core workshops and/or specialized workshops
- Work with Director of Learning and Knowledge Management to assess client satisfaction with workshops
- *Identify and cultivate strategic partnerships with financial services community.*
 - Develop partnerships with financial planning firms and industry groups/leaders (e.g. the Financial Planning Association, CFP Board, etc.) to provide content expertise and support, extend client offerings, and strengthen client outcomes
 - Attend and contribute to community-based and external trainings and field-related conferences
 - Monitor developments in the financial capability, coaching, planning, and technology fields
- *Develop financial coaching training curriculum and technical assistance resources for national network partners*
 - Lead the ongoing development of curriculum to train new financial coaching partners, with a focus on maintaining alignment with existing content and curriculum
 - Collaborate with instructional design consultant or staff to develop curriculum
 - Lead the development of customized financial coaching entry points and support for partners depending on their stage of growth and needs. This will include tools, templates, quick reference guides, resources, short videos explaining key concepts, and Q&A to address common questions and concerns.
 - Collaborate with e-learning consultants or developer(s) to build web-based content and tools

Knowledge, Skills, and Personal Characteristics

Compass seeks a mission-oriented Senior Manager of Financial Coaching with a strong, professional background in personal finance and a proven track record in providing, developing, and implementing culturally proficient financial coaching and education programs for low-income families. Specific qualifications include:

- *Commitment to Compass mission.* Dedication to and passion for Compass's mission to support low-income families to build assets and financial capabilities as a pathway out of poverty. Strong understanding of financial issues and structural barriers for low-income families, including knowledge of housing and public assistance programs, is preferred.
- *Professional and educational background.* Bachelor's degree required and at least 8-10 years of experience. Advanced degree and/or certification in financial planning (e.g., CFP or AFC) is strongly preferred.
- *Financial services expertise.* Strong professional background in financial coaching, financial planning, banking, and/or asset development. Direct experience providing financial coaching, education, and/or planning services to low-income clients is preferred. E-learning expertise is a plus.
- *Excellent oral and written communication skills.* Ability to be an effective and persuasive advocate for Compass's mission. Strong, focused attention to detail and ability to complete work with the highest level of accuracy and efficiency.
- *Commitment to innovation, excellence, and entrepreneurship.* Energized to work in an entrepreneurial, growth-oriented nonprofit organization. Demonstrated commitment to testing and evaluating new ideas and to building data driven, high impact organization. The ideal candidate will be a proactive team player, with a willingness to pitch in to support larger organizational goals.
- *Personal qualities.* Compass requires the highest ethical standards and integrity in service to our network partners and direct-service clients. The ideal candidate will also possess maturity, self-awareness, and sound judgment.

Additional Information

This position will be based out of our Boston office. Travel to our Lynn office and to our national network sites may be required.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. In addition, it does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the position change.

Compensation

The Senior Manager of Financial Coaching position is an exciting opportunity to join a high-growth, mission-driven organization. Compass offers a competitive compensation and benefit package including salary, vacation, 401k, and other benefits.

To Apply

To apply, please submit a resume and cover letter to: apply@compassworkingcapital.org. Please identify the job title in the subject line of your email.

Compass is an Equal Opportunity employer. Personnel are chosen on the basis of ability without regard to race, color, religion, sex, national origin, disability, marital status, or sexual orientation, in accordance with federal and state law.

Compass is located in Boston's financial district at The Nonprofit Center, the first mission-based, multi-tenant center in Massachusetts created exclusively to house progressive social change organizations. For more information, please visit our website: www.compassworkingcapital.org.