



JOB DESCRIPTION

Position: **Credit Building Counselor and Outreach Coordinator**

Position Type: **Full Time**

Time Commitment: **35 hours/week includes**

Some nights and weekend hours

Reports to: **Chief Program Officer**

Position Summary: The **Credit Building Counselor and Outreach Coordinator** is responsible for providing high quality credit building counseling and coaching for Working Credit participants. He/She/They will also develop and implement an efficient and effective system for outreach to participant leads to increase the likelihood that those who enroll in the program, schedule and attend their first session. The position is part of Working Credit's Program Team.

Key Responsibilities Include:

1. Direct Counseling and Coaching (65%)
 - a. Meet one-on-one with participants to facilitate credit building: a credit building appointment encompasses meeting the participant one-on-one, reviewing income & expenses, detailing a baseline financial profile, employment information, budget, and an in-depth review of the credit report and score.
 - Review financial goals and identify needs
 - Understand and explain to participants how to read their credit report
 - Educate on credit building best practices
 - Assist participants with any disputes or inaccuracies
 - Connect participants, when needed, to credit building products, such as secured credit builder loans and secured and unsecured credit cards.
 - Respond to questions and requests for guidance throughout the 12-month term of the benefit; providing coaching services to participants if requested;
 - Maintain follow up with participants on a consistent basis (whether or not they want coaching services) and evaluate progress.
 - b. Counseling Data Management/Administration
 - Ensure participants' files are accurate, up to date and saved in Salesforce. This includes scanning and uploading any forms, budgets, Credit Action Plans and other documents to Salesforce.
 - Keep track of follow up dates and update Salesforce and the stories section when you communicate with a participant.
 - Pull and analyze a new credit report and credit score for every participant every 6 months and prepare a personalized report for the participant explaining how and why the credit score changed, how to continue building credit and how to reap the financial benefits of improved credit – within the context of any changes in the employee's circumstances.
2. Participant Outreach Coordination (pre- and post-counseling) (25%)
 - a. Support the Director of Business Development and Community Engagement in:

- Implementing marketing campaigns to prospective and current participants affiliated with employer and/or program partners with the goal of increasing the number of enrollments and completed enrollments in initial counseling sessions.
 - Conducting post counseling surveys with participants post counseling to assess customer satisfaction and personal feelings of financial wellbeing.
- b. With an eye towards the communication needs and life circumstances of different populations, develop a system for outreach to participant leads that increases the likelihood that those who sign up for an initial credit building counseling session actually attend that session.
 - c. Contact participant leads who have already expressed an interest in participating in credit building counseling but have not yet scheduled their initial appointment as well as those who schedule that first appointment but cancel or do not show up to reschedule those appointments.
 - d. Review Salesforce each day and reach out as prescribed to counseling leads that come in through partners signed on to refer participants through Working Credit's Referral Platform.
3. Other duties as assigned (5%)

Qualifications and Essential Skills

This job requires independent judgment, the exercise of discretion, and the successful completion of a credit building counseling training and apprenticeship program provided to new counselors during their introductory period.

Basic requirements for the position:

- At least one year of credit building or financial counseling experience.
- Demonstrated ability to work independently, as well as part of a team.
- Proficiency with Excel and PowerPoint; familiarity with data management systems knowledge of Salesforce a plus.
- Ability to work nontraditional hours if needed, ability to work remotely and travel.
- Demonstrated history working with diverse populations or traditionally underserved communities.

Additional Qualifications:

- Excellent analytical and problem-solving skills along with a demonstrated ability to think quickly and strategically when presented with a large amount of information.
- Ability to learn, retain, integrate, and apply new information on complex financial topics quickly and accurately.
- Excellent verbal and written communication skills.
- Ability to build trust with clients.
- Ability and comfort level in leading one-on-one, non-judgmental interactions in a variety of settings with individuals from diverse backgrounds and at all levels of the pay scale
- Comfort leading educational workshops of varying sizes for groups of individuals.
- Ability to prioritize and work on multiple projects simultaneously, and to operate in a fast-paced environment.
- Ability to manage a client interview, data collection, and data entry concurrently with a meticulous attention to detail.
- Experience with Salesforce or capacity to learn new technology platforms a plus.

Compensation:

Working Credit offers a competitive starting salary and benefits, commensurate with experience and skills

Location of Employment: Remote

To Apply: To respond to this opportunity, please email resume and cover letter to: hr@workingcredit.org.

We encourage individuals from traditionally underrepresented communities to apply. Working Credit does not discriminate on the basis of race, color, religious creed, sex, gender, age, or any other basis prohibited by law.