



POSITION TITLE: Financial Educator and Coach (**Bilingual - English/Spanish Strongly Preferred**)

ANNUAL PAY: \$46,450 - \$57,450

- 5% bilingual pay differential
- Average Starting Salary for Experienced Candidates: \$50,125
- Upon successfully passing the HUD certification exam, your annual salary will increase by \$1,500.
- **HUD-certified candidates are eligible for a \$2,000 sign-on bonus.**

EMPLOYMENT TYPE: Full time / Non-exempt

ANTICIPATED START DATE: TBD

DEPARTMENT: Asset Building Services

REPORTS TO: Asst. Director for Asset Building Services

DIRECT REPORTS: No

POSITION TYPE: Hybrid (Onsite hours) at Clackamas or Marion County locations

ABOUT DevNW:

DevNW and our CDFI partner Community Lending Works (CLW) and Construction Partner Neighborhood Building Corporation are fostering vibrant, inclusive communities by prioritizing housing, asset development, wealth building, and small business development. To do this work we are deconstructing pervasive systems of oppression such as racism, classism, or sexism that maintain persistent disparities and perpetuate deep imbalances in power, opportunity, and wealth.

OVERVIEW:

The Financial Educator and Coach serves as a financial educator, coach, and community partnership coordinator. This position will deliver financial education and coaching, build community partnerships for increased homeownership among historically discriminated communities, support clients with resources, and ensure accurate documentation for compliance and program success.

In this opportunity, you will excel if you recognize the collaborative nature of coaching, tailoring support to individual goals and aspirations. It understands the importance of homeownership for long-term affordability, generational wealth, and economic growth, while embracing empathy and trauma-informed practices. Additionally, it is committed to

addressing systems of oppression and advancing economic and social justice by increasing wealth building and homeownership rates in historically excluded communities.

REQUIRED COMPETENCIES:

- An ability to analyze peoples' financial picture, translate those findings into useful information and co-develop pathways towards money-related goals and action steps.
- Have a foundational knowledge of personal finance and/or homeownership and a commitment to staying up to date on industry developments and best practices.
- Ability to explain financial concepts in accessible ways, and confident in applying basic mathematical functions like ratios and percentages.
- Experience working with a diverse range of individuals from different backgrounds, including those from different racial, gender, immigration, and socioeconomic status backgrounds, for at least one year.
- Demonstrated experience and comfort adapting your coaching and teaching approach to meet the unique needs of each individual.
- Demonstrated ability to manage and navigate multiple tasks with competing deadlines while collaborating with both internal and external stakeholders to ensure timely completion and successful outcomes.
- Ability to effectively utilize Microsoft Office Suite applications, including Excel, Word, and Outlook, Adobe Acrobat, Zoom, Teams, as well as experience learning and adapting to new software programs.
- A private and comfortable home office environment that allows for focused and uninterrupted counseling and class sessions.
- A valid driver's license and the ability to travel regularly across DevNW service areas, Lane, Benton, Marion, and Clackamas counties.
- Ability to lift and move objects weighing up to 40 pounds and comfortably stand for extended periods of time during class instruction.
- Ability to work a flexible schedule including evenings and weekends to meet the needs of the program and clients.
- Preferably, the candidate will be HUD certified. \$2,000 sign bonus if you are already HUD certified!
- Ability to pass the HUD Housing Counselor Certification exam within 60 days of hire. (Internal and external training will be provided)

RESPONSIBILITIES:

- Provide one-on-one financial or homeownership consultations, including budget counseling, analysis of credit, analysis of debt-to-income ratios, explanation of debt repayment options, creation of an action plan, and referrals to other programs and services.
- Facilitate adult education using a variety of teaching methods to ensure that educational content is accessible and effective for adult learners with varying learning styles.
- Coordinate and conduct classes in first-time home buying, personal finance, other financial wellness topics, and other DevNW partnership group education efforts.
- Collaborate with your team of Financial Coaches to develop, revise and evaluate DevNW curriculums, class material and outreach collateral. Research alternative curriculums for potential enhancements.
- Create educational and social videos and content around financial wellbeing and home buying.
- Keep up-to-date on relevant information in the personal finance and homeownership field.
- Provide language-appropriate instruction, counseling, and translation as needed or requested (Bilingual Financial Coaches only)
- Develop partnerships and conduct outreach with communities that have experienced marginalization and historical disinvestment, and partner with the in-house Outreach Coordinator on outreach approaches
- Compile and maintain complete and accurate client and class files in order to account for services supported through various funding streams. Ensure client and class data entry and administration tasks are completed in a timely manner.
- Recruit, train, and manage volunteer guest instructors, including mortgage lenders, realtors, home inspectors, insurance agents and financial planners.
- Create written material to communicate with clients, volunteers, and partners. Ensure timely communication.
- Coordinate all aspects of classes including reserving class spaces, confirming volunteers, conveying information to participants, ensuring website and digital calendars are up-to-date.
- Identify issues and trends affecting clients, and communicate your observations (as well as potential program updates/changes) to the Financial Innovation Manager and Financial Wellbeing Director.
- Utilize study materials, training sessions, and designated study time in preparation for

HUD exam

- Participate in staff and program area meetings and training.

BENEFITS:

- Generous employer contribution for Employee medical, dental and vision insurance. Medical insurance includes extensive behavioral health, chiropractic and acupuncture benefits.
- Annual paid time off includes vacation, sick, personal and self-care days.
- The organization recognizes all twelve federal holidays as paid days off as well as two floating holidays to acknowledge or celebrate important days not a part of the organizational holidays.
- 401k program with employer match after one year of service
- Voluntary Life/AD&D, Accident & Illness insurance programs and Flexible Spending Account (FSA) with debit card. A robust Employee Assistance Program (EAP) available to all employees regardless of enrollment in the benefit program includes eight counseling sessions, legal assistance, identity theft protection, pet insurance and gym discounts.
- Perks include Flexible work schedule (4/10s, 4/9s +4, 5/8s or modified version of 40 hours appropriate to fulfilling duties); Hybrid – work from home or one of four office locations; Home office set-up stipend, Monthly internet stipend; Monthly cell phone stipend or mobile phone (if applicable); Annual Gathering prize giveaway; and Free financial education classes.

TO APPLY: Provide an **introduction letter** and **current resume** via email detailing your interest that includes the following to < ross.kanaga@devnw.org >.

Application Due Date: Until Filled

DevNW is an Equal Employment Opportunity Employer. All qualified people are encouraged to apply. Applications for employment will be considered without regard to race, color, national or ethnic origin, religion, gender, gender identity, sexual orientation, marital status, age, disability, and any other characteristic protected by applicable law.

Studies have shown that women and people of color are less likely to apply for jobs unless they meet every one of the qualifications listed. We are most interested in finding the best candidate for the job, and that candidate may be one who comes from a less traditional background. If you meet key qualifications for the job, and believe you would be the best fit, we encourage you to apply; please use your cover letter or introductory email to explain how you will accomplish parts of the job for which you have less experience. If you are unsure whether you meet the qualifications of this position, please feel free to contact us.

DevNW values diversity and supports a welcoming, inclusive environment where all of our employees can thrive. We value a workforce that is representative of the communities we serve.

DevNW is an Equal Employment Opportunity Employer committed to providing reasonable accommodations to individuals with disabilities in accordance with the Americans with Disabilities Act (ADA) and other applicable laws. If you require accommodations due to a disability to participate in the application process, please email < contacthr@devnw.org. >