

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

POSITION OPENING: FINANCIAL INCLUSION COORDINATOR HOURLY RATE: \$16.00 TO \$19.50 PER HOUR

ABOUT PREPARE + PROSPER

Prepare + Prosper (P+P) is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. Learn more about P+P at prepareandprosper.org.

FAIR is a program of P+P in partnership with Sunrise Banks that addresses the financial inclusion gap by offering a set of financial products [checking, savings, credit builder] through a unique marketing and distribution model. The program is offered in the community at trusted places where people live, work, and receive services. Learn more about FAIR at fairfinancial.org.

P+P values a diverse and equitable work environment. Black, Indigenous, and people of color (BIPOC), individuals with disabilities, LGBTQIA-identified, and people from other underrepresented communities are strongly encouraged to apply.

POSITION AT A GLANCE



Our preferred candidate comes with experience fostering customer success, creativity in developing solutions, and enjoys being organized and digging into the details.



This is a non-exempt, full-time position with a comprehensive benefits package. Additional details below. This position requires 2 nights a week and 1 weekend a month.



The office is located near University Avenue West and Highway 280 in St. Paul with free parking and public transit options available.



This position reports to the financial inclusion manager.

ABOUT THE POSITION

The Financial Inclusion Coordinator develops creative solutions to engage and support the FAIR customer in being successful throughout the entire customer journey from signing up for, adopting, and using their new bank account(s) to reach their financial goals.

The coordinator works internally across P+P's programs and externally with organizational partners to increase awareness and promotion of the FAIR program and manages all incoming referrals and enrollments. In all this work they are keeping detailed records using a customer database and tracking feedback with the aim of improving the program.

The coordinator promotes and incorporates diversity, equity, and inclusion in every customer interaction and supports to advance P+P's racial equity and economic justice commitment to address systemic racism and foster trust in supporting customers in building financial well-being.

HOW THE POSITION BREAKS DOWN

Fostering customer relationships (approximately 40% of the position)

- Manage all referrals, inquiries and customer correspondence and provide excellent and responsive customer service.
- Collaborate with other staff to ensure FAIR is successfully integrated into all P+P's programs.
- Meet with customers both virtually and in-person to guide them through the account sign up processes.
- Provide follow-up support and coaching to newly enrolled FAIR customers to support them in being successful with their new FAIR account(s).
- Review customer's credit and bank history reports and scores to help determine their best path forward.

Program administration (25% of the position)

- Track program participation and retention through detailed record keeping in a customer database.
- Serve as a point person and advocate between the customer and bank to ensure accounts *get* opened and *stay* open and complaints are resolved.

Partnership outreach and management (15% of the position)

- Work with the outreach coordinator to identify, develop, and foster mutually beneficial partnerships with organizations across the Twin Cities.
- Participate in opportunities to engage with and educate the community about FAIR.
- Lead the planning, logistics, and execution of all community pop-up enrollment events and support manager in supporting customers who are Community Ambassadors.

Program design (15% of the position)

- Track trends from feedback and data on account-performance to create new and/or modify existing solutions and interventions in the program.
- Identify and/or develop new support resources like how-to guides, worksheets, trainings, and/or tutorials to help people get more out of their accounts.

Other (approximately 5% of the position)

- Attend and actively participate in required educational programs and meetings.
- Protect P+P's value by keeping information confidential.

WORK ENVIRONMENT

- This position operates primarily in an office environment that is accessible. Some work at off-site locations may be required and those may not necessarily be fully accessible.
- The employee must be able to detect, interpret, and read objects at close and far distances.
- The employee must frequently lift and/or move objects up to 25 pounds and occasionally lift and/or move objects up to 40 pounds.
- While performing the duties of this job, the employee is regularly required to talk and hear.
- Travel between the main office and remote Twin Cities locations is required. Must have access to reliable transportations options.

QUALIFICATIONS

The right candidate will possess:

- Ability to quickly build rapport with and sensitivity to issues and concerns of BIPOC communities and other marginalized groups.
- Experience with and strong commitment to providing quality customer service.
- Strong verbal and written communication skills -- including public speaking, relationship building, and community outreach.
- Ability to communicate and respond in a timely manner.
- Experience with or adept at learning new technologies like computer relationship management (CRM) software and databases (position will use MS Outlook, Word, Excel and HubSpot).
- Ability to deliver quality work, manage multiple projects, and meet tight deadlines.
- Have a clear understanding of income and wealth gaps (by economics, race, and gender), under-resourced, and inequity in communities.
- Creative; collaborative; interested in problem solving; driven to improve the experiences of customers and those financially marginalized.
- Minimum of 2-year degree (e.g. associates degree) or 2 years of relevant work experience

BENEFITS THIS POSITION OFFERS

Our benefits package for this position includes:

- Health, dental, life, and short/long term disability insurance
- Generous PTO accrual rate (19 paid days off for the first year of employment)
- 16 paid holidays (14 set days and two floating holidays)
- Retirement plan (SIMPLE IRA)
- Flexible Spending Account/Health Savings Account
- Mileage reimbursed for work-related travel.

HOW TO APPLY

- Please submit resume and cover letter to jobs@prepareandprosper.org with the subject line "Financial Inclusion Coordinator."
- Indicate in your email where you heard of the position opening.
- Anticipated start date: As soon as possible

In your cover letter, we encourage you to write about:

- What interests you in working for P+P.
- What you are passionate about.
- Highlights your experience and understanding of race, equity, justice, diversity, and inclusion principles in an organizational setting.
- Highlights of your personal and professional background that help us see you as an outstanding candidate.
- Please feel free to note which pronouns you use (For example: she/her/hers, he/him/his, they/them/theirs, etc.).

OUR COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY

P+P continues to work towards a more inclusive workspace, and as such, we are an equal opportunity employer and do not discriminate against any employee or applicant for employment because of race, skin color, ethnicity, religion, gender, sexual orientation, national origin, disability, age, marital status, military status, pregnancy, or parenthood.