



## JOB DESCRIPTION

<b>TITLE</b> Coach, Minority Small Business		<b>Division</b> Financial Empowerment, Stand By Me
<b>GRADE</b>	<b>FLSA</b> Exempt	<b>REPORTS TO</b> Vice President, Financial Empowerment
<b>DATE</b> December 7, 2020		
<b>EXPECTATION FOR ALL EMPLOYEES</b> Support the mission, vision, and values of United Way of Delaware (UWDE), Delaware 211 (DE211), the Delaware Afterschool Network (DEAN) and Stand by Me (SBM). When appropriate, participate in various after hours and weekend activities that benefit UWDE, DE211, DEAN, SBM and the community. Due to the leadership role UWDE is called upon to play in the community, it is the expectation that all UWDE staff will be fully engaged in community meetings, events, and activities.		
<b>POSITION SUMMARY</b> The role of the Coach, Minority Small Business (CMSB) is to provide one-on-one business (including financial) coaching services through the SBM program. The CMSB will have experience working with diverse communities and understands the cultural subtleties of people of color to provide customers with business and personal coaching to reach their goals. In working with customers, she/he should be proficient in developing meaningful relationships; developing a comprehensive understanding of customer financial situation; determining customer needs and goals; delivering financial education and training to customers, both individually and in group settings; guiding customers in developing individualized financial sustainability plans. She/he should have experience working with customers (establish and maintain relationships) She/he should have experience in developing and implementing a marketing and outreach plan; working in a professional manner, both independently and collaboratively with a team; ensuring that customer information is confidentially maintained, updated and in compliance with organizational requirements and policies.		

## ESSENTIAL FUNCTIONS

### Financial Coaching

- Engage with customers to gain a comprehensive understanding of their business and financial situation and needs.
- Assist and empower customers to identify and assess their business goals and financial sustainability plans.
- Coach, mentor, and motivate customers to clarify their options and actively implement their financial goals.
- Understand the steps needed in pursuit of customers' goals and assist customers in achieving financial milestones.
- Provide customers with financial coaching in English and Spanish.
- Support customers in accessing financial resources and utilizing financial tools.
- Build and maintain collaborative relationships with other SBM coaches throughout Delaware.
- Develop meaningful relationships with customers, community, and program partners.
- Provide individual business/financial education to prospects and customers in group settings.
- Establish and maintain working relationships with financial institutions.
- Maintain a working knowledge of in-house and community resources and services posted on SBM's Google drive to provide customers with referrals to program partners to achieve specific financial goals.
- Conduct outreach and case management.
- Facilitate financial workshops.
- Participate in all financial coaching training programs offered by SBM.
- Participate in regular statewide coaching meetings.
- Maintain professionalism according to the UWDE code of ethics. Refrain from injecting personal beliefs into relationships with customers and partners.

### Data Management and Reporting

- Maintain accurate customer and group coaching data, including attendance rosters, evaluations, coaching notes, and customer engagement.
- Ensure files and practices are completed and in compliance with funder and government policies.
- Ensure completion of all SBM customer forms.
- Track all workshops and activities utilizing required sign-in sheets.
- Manage and input information on coaching, workshops, taxes by encouraging customers to utilize the free tax filing software supported by United Way Worldwide (e.g. MyFreeTaxes) and other SBM program related efforts.

- Track and report on program milestones and deliverables.
- Set aside a time each day and week to ensure that all data entry is current and complete.
- Maintain all documentation for customer intake, credit permission and credit reports.
- Maintain documentation and reports of all efforts.
- Maintain strict confidentiality of customer information, action, and records.

### **Workshops and Public Presentations**

- Develop competency to deliver program related presentations, workshops, etc.
- Ensure that the content and delivery of all presentations are consistent with the coaching methodology used by SBM, i.e. interactive with audience participation.

### **Marketing and Outreach**

- Develop marketing and outreach plan with program partners.
- Actively promote the program to potential customers.
- Work with management team to create awareness about the program.
- Attend community events to represent the program.
- Work with SBM UWDE to develop strategies to integrate information about SBM into all organizational programs and outreach efforts.

## **QUALIFICATIONS/ SKILLS AND KNOWLEDGE REQUIREMENTS**

### **EDUCATION**

- Bachelor's degree or five years' experience in related field
- Certificate in Personal Financial Coaching (will be obtained on the job)

### **SKILLS and KNOWLEDGE**

- Fully fluent (speaking and writing) in Spanish and English preferred
- Demonstrated understanding of intersection of racism and poverty
- Ability to relate to individuals from varying socio-economic, ethnic, and cultural backgrounds
- Self-starter and energetic personality
- Solid working knowledge of the financial industry (including credit, lending, savings, budgeting, etc.)
- Solid working knowledge of small business financial resources
- Demonstrated experience in quality customer service
- Demonstrated ability to prioritize and meet communicated schedules and deadlines
- Demonstrated ability to work independently, and as part of a team
- Willingness to work evenings and weekends to accommodate program needs
- Strong written and oral communication skills
- Professional demeanor and networking skills
- Excellent case management skills
- Computer literate with emphasis on database management, excel and publisher.
- Willingness and ability to learn and apply new techniques
- Attention to detail and have accuracy in daily work
- Ability to handle confidential information
- Excellent organizational skills and highly motivated
- Must have reliable transportation with valid insurance

### **CORE COMPETENCIES**

- **Critical Thinking and Creative Problem Solving** – Is able to address and manage complex issues to achieve desired results. This includes the ability to gather, interpret and use relevant data to drive strategy development, make decisions and drive for results.
- **Planning and Implementation** – Is a leader and takes initiative in planning and developing initiatives within impact areas to achieve results that drive collective community outcomes.
- **Results-Driven** – Our staff is dedicated to shared and measurable goals for the common good, creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Relationship Building** - Develops and maintains strategic relationships that generate the resources necessary to support United Way's mission.
- **Entrepreneurial and Innovative** - Creatively seeks new opportunities to generate revenue and other resources that add greater value to the organization and the community.
- **Community Collaborator** - Engages diverse stakeholders to accurately and effectively assess community need with credibility, authenticity and humility strategically guides UWDE to contribute to the community's priorities; Is an

effective and passionate communicator, articulating the UWDE message in a way that inspires others to act in service to the organization and the community needs.

- **Embracing and Managing Change** - Champions and facilitates change to ensure long-term community sustainability. He/she adapts successfully to changing needs while maintaining positive relationships with all constituents, internal and external.

**PHYSICAL/ENVIRONMENTAL**

- Statewide travel (use of personal vehicle, valid driver’s license and proof of insurance) are required.
- Occasional out-of-state and overnight travel may be required.
- Environmental conditions include the ability to work indoors and outdoors year-round.
- Ability to stand, walk, bend, reach and sit for extended (8 hours or more) periods of time.
- Ability to lift minimally 25lb objects and move from one place to another.

**ACKNOWLEDGEMENT OF UNDERSTANDING:** The above statements are intended to describe the general nature and level of work being performed by people assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties and skills required. Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time.

PRINT EMPLOYEE NAME

EMPLOYEE SIGNATURE/DATE

## UNITED WAY OF DELAWARE CORE VALUES STATEMENT

As a member of the United Way of Delaware team, we expect that you and every employee will live up to our Core Values and that you will model these behaviors inside and outside UWDE.

	<b>“WOW” Customers</b>	<p>There are thousands of nonprofits organizations, so we must innovate and find ways to stand out. We believe that our people define us and that our expert, caring colleagues enabled by new ideas and insights can be our differentiator.</p> <p>This mission is an inclusive one – <b>no matter where you sit in the organization, you interact with and support customers.</b> Let’s work together to make sure those we do business with have the best possible experience.</p>
	<b>Grow and Learn</b>	<p><b>We’ll work together to better understand what our customers want and need</b> – continuously evaluating everything from our strategies to our processes – and make UWDE more appealing and relevant to our donors, partners and stakeholders. To achieve this is an ever-changing environment, we need colleague who are continuous learners and are change resilient.</p>
	<b>Collectively Drive Change</b>	<p>Change is inevitable and constant. Our ability to deliver meaningful results is critical as we move forward in our journey. Together, we can work smarter, leveraging the insights provided by data to <b>learn more about our customers and community to empower our colleagues to make better, faster decisions.</b></p> <p>This mindset will help us to work differently and approach our work in a more agile fashion – aiming to deliver value more quickly versus traditional efforts to be tactical and task oriented.</p>
	<b>Mission-Driven</b>	<p><b>Diversity, inclusion and belonging will always be a priority knowing that our difference makes us that much stronger.</b> We want this to be a place where you feel proud and happy, and know your ideas are welcomed and valued. Together, we’ll learn and embrace new skill sets and perspectives to help take us forward.</p> <p>In working together and in support of one another, we will work to create an environment where <b>we’re attracting and retaining the very best talent</b> to drive employee engagement, customer commitment and financial success.</p>
	<b>Relationship- Oriented</b>	<p>At the heart of our work lies the community. <b>Our genuine and authentic colleagues leverage their passion and skills set to create lifelong relationships to drive social change.</b> This means we have to operate with a shared vision internally (no silos and division) and create and influence a shared community vision.</p>