

## **Job Description: Community Financial Centers Financial Services Manager**

Community Financial Centers (CFC), a region wide initiative seeks to improve the economic security of residents by providing high quality, professionally delivered one-on-one financial consultation that navigates individuals through the complexity of their financial continuum to achieve long term economic self-sufficiency focused on tapping the aspirations of clients. CFC has a main service delivery hub, 11327 Shaker Blvd, Suite 500W, Cleveland, Ohio, with satellite locations throughout the city of Cleveland. The Financial Services Manager Position will reside at Slavic Village office located at 5700 Broadway Avenue, Cleveland, Ohio and report directly to the Community Financial Centers Program Director within Cleveland Neighborhood Progress' Economic Opportunity Department.

### **Responsibilities**

Duties shall include, but are not limited to:

1. Assess client needs and develop individual financial action plans with each client.
2. Provide a minimum of **300** individualized financial coaching sessions (including both initial and follow-up sessions) and achieve applicable client outcomes per year.
3. Make appropriate referrals and integrate other wraparound supports (i.e. benefits, tax preparation, other family supports) into counseling to achieve greater results.
4. Conduct ongoing follow-up with clients to provide support and guidance to reach the goals outlined in their financial action plan.
5. Collect, track and report required data using client management database.
6. Work to build lasting relationships with participating organizations.
7. Take a proactive approach to understanding and responding to all participating organizations' needs. These duties may include spreading awareness of services and providing education on available services.
8. Manage retention related projects.
9. Participate in trainings and ongoing professional development trainings.
10. Follow required protocol and program requirements.
11. Follow client confidentiality policies as outlined in the personnel policies and procedures.
12. Participate in and successfully complete program required professional development offerings by Community Financial Centers' training partner, Cuyahoga Community College and other nationally recognized industry certifications, i.e. U.S. Department of Housing and Urban Development and Association for Financial Counseling and Planning Education, as deemed applicable to job performance.

### **Essential Skills**

- Bilingual Spanish preferred - Must be fluent in speaking, reading, and writing
- Bachelor's degree from an accredited college in business, banking, financial education, social work or related field.
- 3-5 years of experience in sales, customer service, financial services, social service delivery, financial planning, coaching, teaching/instruction or other related field.
- Demonstrated capacity for understanding finance, personal finance and financial structures and service delivery.
- Experience working in diverse, multicultural and immigrant communities
- Exceptional customer service, written/oral communication, and strong interpersonal skills required.
- Demonstrated planning and organizational skills.
- Proficiency in time management.
- Knowledge of greater Cleveland's banking community/environment desirable.
- Familiarity and experience with social media channels.
- Ability to work in both a team setting and independently and ability to function well in a small staff environment.
- Intermediate level of proficiency in Microsoft Office Suite (Word, Excel, Access and PowerPoint) and Microsoft Outlook required. Capacity to learn new software applications such as a client management database.
- Ability to think critically while providing superior customer service and empathy to clients.
- Available to work some evenings and weekends.

### **Physical Requirements**

- May be required to work more than 8 hours during a workday
- Sitting or standing for long periods of time
- Significant manual dexterity for keying in data for longer periods of time

### **Scheduling Requirements**

- Must be available to work occasional off-hours
- Must be available during standard business hours
- Incumbent has limited flexibility to schedule activity with the approval of supervisor
- Ability to work in multiple locations during a given work week

### **Additional Requirements**

- Reliable vehicle in order to commute between designated locations
- Must possess valid, up to date insurance for vehicle
- Must possess valid, up to date driver's license

### **SEND RESUMES TO:**

Sheri Dozier  
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***No phone calls please***

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