



## PACE, Inc. | JOB DESCRIPTION

Position: Financial Wellness Manager  
Reports to: Deputy Director  
LOCATION: 1314 N. Meridian Street., Indianapolis IN 46202  
HOURS: 8:30am – 5:00pm

Do you have a desire to teach others about financial literacy? Do you have a passion for assisting individuals who are coming out of incarceration?

PACE is seeking a financial coach to work alongside our clients to achieve their financial goals. If you will bring that sense of excitement and knowledge to our clients, PACE would love for you to join our team! Our organization seeks to attract talented professionals who possess a strong belief in our mission and a commitment to customer service and relationship-building. PACE is proud to be an equal opportunity employer.

To discern your match for the position, qualified candidates should apply by sending a cover letter and resume to: [pace@paceindy.org](mailto:pace@paceindy.org)

Please include in your cover letter your responses to these questions:

**What is your experience working with individuals who have been impacted by the justice system?**

**What experience or qualifications do you feel make you a uniquely qualified match for this position?**



### **ORGANIZATIONAL OVERVIEW:**

For over 60 years, Public Advocates in Community re-Entry (PACE) has provided resources and services to assist justice-involved individuals and their families to lead productive and responsible lives in our community. Our team believes that **felonies don't define futures**, and that no one's life should be defined by their worst day. To support successful re-entry, PACE works to reduce recidivism and advance equity through the following:

- Providing direct services to those who have already exited incarceration, including employment training and placement services, recovery, harm reduction, and relapse prevention supports, assistance enrolling in public programs and securing basic needs.
- Helping those prior to release identify their individual needs and goals to prepare for re-entry.
- Providing advocacy services at the state and local levels to support equitable public policy.
- Sharing statistical data about our clientele and the broader justice system to educate key stakeholders, including employers and other community organizations.
- Close coordination with the court system and correctional facilities to develop a pathway to successful re-entry and ensure greater connectivity to services.
- Offer evidence-based training in the areas of re-entry and substance use disorder and recovery.

PACE is a member of the Marion County Re-Entry Coalition and as a nonprofit 501(c)3, PACE has been a United Way agency since 1967.

### **POSITION DESCRIPTION:**

The Financial Coach is a vital component in assisting our participants in achieving economic mobility. Acting as a front-line coach to our participants you will communicate in an open, helpful, and engaging tone and focus on finding the right pathway with each individual.

We need a coach who will interact discreetly and effectively with participants on a range of financial and asset building issues. Financial Coaches work on topics ranging from rebuilding a credit score, saving for a car, paying off debt or building a retirement fund. Your commitment to this community means a willingness to work flexible hours that best meet the needs of participants and participate in community outreach.

### **EXPREIENCE, SKILLS AND QUALIFICATIONS**

- Educational experience in business, finance, or a related field of study is preferred but may substitute significant, highly relevant work experience.
- Ability to successfully apply financial coaching skills with the target population.

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- Excellent social/interpersonal skills and writing ability commensurate with the communication and reporting requirements of the position.
- Strong computer skills including experience with MS Office applications, using the Internet and database management.
- General knowledge and understanding of the needs of individuals with criminal histories, as well as knowledge of available community resources.
- Well-organized and self-directed, with ability to manage multiple tasks and priorities with great attention to detail.
- Ability to multi-task a variety of activities and remain focused on best customer service.
- Ability to interact with people of all ages and cultural backgrounds

#### **POSITION REQUIREMENTS:**

PACE utilizes the Center for Working Families (CWF) program model for the delivery of social services. The job responsibilities include:

##### ➤ **Financial Coaching**

- Uses the co-active coaching model to interact with clients.
- Providing one-on-one financial coaching to CWF participants, including assessing financial situations and helping them to develop realistic spending, savings, and debt management plans, improving or building credit, developing emergency savings funds, and building assets (retirement, education, housing, etc.)
- Developing long term coaching relationships with our clients and their families for long term results.
- Facilitating financial workshops.
- Managing outcome tracking and documentation requirements for the financial coaching component of CWF or other funded programs.
- Regularly document progress of participants through the Efforts to Outcomes system.
- Coordinate and work with CWF team members to promote and facilitate participation for potential individuals that might benefit from the program
- Developing and maintaining relationships with financial institutions to encourage more affordable financial products and services for CWF constituents

##### ➤ **Income Support Coaching**

- Complete client assessment in initial interview and determine possible income supports available.
- Identify, evaluate and assist CWF participant's eligibility to secure income and work supports including but not limited to Disability, TANF, SNAP, and Health Insurance.
- Provide intensive coaching services to Center for Working Families (CWF) participants, assisting the client in developing individualized plans to ensure success.
- Provide services (food, temporary housing, travel, clothing, etc.) which PACE can do directly or by referral to other agencies/individuals.

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- Serve as the liaison to various types of emergency assistance (i.e. EAP, WAF, FEMA, CERF, ESG, and food pantries).
- Provide consultation for other PACE staff working with clients around income supports, public assistance and housing.
- Work closely with the CWF team of coaches, sharing and coordinating income and work support related information to the other coaches as they coach participants to economic self-sufficiency.
- Make follow-up phone calls after referrals are made. Ensure all referrals are documented in case management system and in client's file.
- Remain knowledgeable about available income supports, barriers that affect those with felony convictions and ensure the staff are updated on any changes to the eligibility.

**PACE, INC. RESPONSIBILITIES:**

- Always represent PACE in the most professional way especially when in the community.
- Attend and actively participate in all staff meetings.
- Dress, always speak and conduct yourself in an appropriate and professional manner.

**OTHER:**

- Remain educated about service agencies in central Indiana.
- All other duties as assigned.