



*IBA empowers individuals and families to improve their lives and achieve socio-economic mobility through high-quality affordable housing, education, financial and resident empowerment and arts programs.*

## We are looking for: **FINANCIAL COORDINATOR**

(Full-Time/On-Site)



### **This position is for you if you:**

- ▶ Want to be part of a mission-driven organization serving the evolving needs of Boston's Puerto Rican and Latino-identified community.
- ▶ Want to help clients achieve financial security with asset and credit building through individual coaching services provided to community members, residents and program participants.
- ▶ Can evaluate progress and track outcomes through ongoing financial coaching, support and guidance to set and reach client's goals
- ▶ Can development and teach financial empowerment workshops, source external resources, develop and maintain relationships with community partners and IBA staff to promote and support the program
- ▶ Go the extra mile to achieve the program and the organization's goals.

## **ESSENTIAL FUNCTIONS AND RESPONSIBILITIES**

- ▶ Delivers personalized and ongoing one-on-one financial coaching and guidance to IBA clients, focusing on five core areas: income growth, credit, debt, savings, and long-term asset building.
- ▶ Collaborates with clients to establish goals and develop actionable steps to achieve those goals, serving as a supportive partner and advocate throughout their journey in the program.
- ▶ Provides appropriate referrals to connect clients with resources and services that can aid them in achieving their financial goals.
- ▶ Provides support to the Program Director with grants, reporting, administrative tasks, and program participation. Delivers financial empowerment workshops, fostering relationships with community partners and IBA staff, and leveraging external resources to promote and support the program.

### **DATA AND MONITORING**

- ▶ Identifies trends, action plans, referrals and follow up.
- ▶ Supports with data management that enable high quality, accurate data collection, entry and integration along with efficiently transcribing relevant program data into Salesforce.
- ▶ Maintains accurate and confidential client information and progress data, ensuring adherence to strict data security protocols and confidentiality standards.

### **OUTREACH / EXTERNAL COMMUNICATION**

- ▶ Conducts outreach, recruitment, information and intake to potential students year-round.
- ▶ Establishes linkages with other local community organization, agencies and social service providers as well as create and maintain referral processes with service providers.
- ▶ Responsible for meeting or exceeding established targets for program participation and outcomes.
- ▶ Represent IBA at meetings as needed.

### **OTHER DUTIES:**

- ▶ Supports Program Director with grants, reporting, admin tasks and general program participation.
- ▶ Participate in IBA's annual events: Three Kings Day, Membership Drive, Board Election, Festival Betances and other community events.
- ▶ Ad hoc duties ad needed.

## GENERAL COMPETENCIES AND QUALIFICATIONS REQUIREMENTS

- ▶ Bachelor's degree in education, social science, finance or related field preferred.
- ▶ Two or more years of direct experience providing instructions and coaching in community-based organizations, particularly in the area of financial coaching.
- ▶ Demonstrated knowledge of personal finance concepts and coaching.
- ▶ Knowledge and experience working with low-income, ethnically diverse communities is required.
- ▶ Bilingual fluency in English and Spanish – verbal and written – is required. Strong writing skills required.
- ▶ Excellent computer skills required.
- ▶ Experience working with educationally underserved learners is preferred
- ▶ Ability to translate executive-level organization goals into specific program initiatives.
- ▶ Must be extremely organized and demonstrate attention to details.
- ▶ Must demonstrate a positive and productive attitude.
- ▶ Ability to work autonomously and in a team setting.
- ▶ Experience working in an urban community with diverse population.
- ▶ Public speaking and facilitation skills
- ▶ Customer service oriented

## COMPENSATION AND BENEFITS

IBA is proud to offer very competitive \$69,000 salary, commensurate with experience, and a robust benefit plan that includes an 80/20 premium cost share for comprehensive health, dental and vision insurance; a generous HRA provided by the company (\$9,100 or \$18,200 based on single and family coverage) and other built in supports that significantly reduces or eliminates out of pocket medical expenses. We offer a 403b plan with annual employer contribution, generous paid time off.



### WORK CULTURE

IBA is located in Boston's historic South End in the multiculturally rich community of Villa Victoria. We value teamwork and collaboration, believe in developing leaders and foster a culture of excellence. Our commitment to inclusion, equity, empowerment and community building is inherent in IBA's mission, imbedded in our values and demonstrated in the ways we work together to achieve mission impact and outcome goals.

**To apply please submit a resume and cover letter to:**

**Organization:** Inquilinos Boricuas en Acción, Inc.  
**Location:** Boston, MA  
**FLSA Classification:** Non-Exempt  
**Supervisor:** Financial Empowerment Program Director

[ibaboston.isolvedhire.com](http://ibaboston.isolvedhire.com)



As an EOE/AA employer, IBA will not discriminate in its employment practices due to an applicant's race, color, religion, sex, national origin, sexual orientation, gender identification, veteran, or disability status.