



Job Description

Health Education Council

Economic Well-Being Program Team

Financial Coach – Full-Time (30-40 Hours per week)

\$26 an hour

Deadline for Receipt of Applications: Friday, August 29 or until filled.

The mission of the Health Education Council is to cultivate health and well-being in under-served communities by leveraging the power of collaboration. The Health Education Council (HEC) is a non-profit agency focused primarily on eliminating preventable causes of death resulting from the use of tobacco, poor nutrition, unsafe neighborhoods, and lack of physical activity and operates dozens of public health programs to meet the needs of diverse communities by increasing access to health-related knowledge and information (www.healtheducouncil.org). We represent diverse staff, community partners and funders to better serve communities that otherwise do not have a voice for care, or access to healthy environments.

About the Position:

HEC's Economic Well-Being Program builds sustainable economic foundations for individuals, families, and small businesses as a foundation of community health. The City of Sacramento recently selected HEC as a new implementation partner for its Financial Empowerment Center (FEC) initiative, which provides free one-on-one financial coaching for Sacramento residents 18+. Sacramento's FEC is part of a national network supported by the Cities for Financial Empowerment Fund (CFE Fund). Through this City contract partnership, HEC will be adding two FEC Coaches to the Economic Well-Being team.

HEC is proud to serve as a community partner in this initiative.

Responsibilities:

The Financial Coach will work in collaboration with HEC's Economic Well-Being Program Director to support FEC clients around their long-term financial wellness goals, by delivering ongoing coaching and counseling services to Sacramento residents. The role supports clients throughout their financial journey, including money management, savings strategies, debt reduction, credit repair, and connecting with financial institutions. This position reports directly to the Program Director and is a member of the FEC team.

Job responsibilities include but are not limited to:

- Provide individualized financial coaching sessions (both initial and follow-up) to clients on budgeting, saving, banking, debt management, credit building, and long-term financial planning.
- Create individual financial action plans with clients and support them in reaching their goals.
- Facilitate occasional financial education workshops for the community, including culturally tailored content as needed.
- Maintain client caseload and provide consistent follow-up, tracking progress over time.
- Provide case management by connecting clients to relevant wraparound services as needed through financial coaching. These services may include, but are not limited to, accessing benefits, transportation, childcare, tax preparation, and emergency financial support.
- Participate in HEC-led community events, workshops, and outreach opportunities to promote financial coaching.
- Serve as a liaison between residents and local institutions (banks, housing, schools, etc.) to connect clients with supportive resources.
- Build and maintain community partnerships by participating in local coalitions and collaborating with banks and financial institutions.
- Represent HEC at FEC events, community partner and city events to promote financial wellness programming.
- Accurately document service delivery and outcomes in the designated database system (e.g., ETO or similar).

- Successfully complete the CFE Fund-required financial coaching training, including passing the final certification exams.
- Participate in ongoing financial counseling and program training and maintain certification and related professional development opportunities.
- Stay up to date on emerging trends and best practices in financial coaching and community-based economic empowerment.
- Conduct program tracking documentation and reporting for grant compliance and evaluation.
- Complete additional training, as needed, to remain current and knowledgeable on helping community members navigate local services.
- Complete other duties as assigned by supervisor.

Minimum Qualifications:

- Bachelor's degree in business, public health, social work, education, or a related field **OR** at least 2+ years of relevant experience in financial coaching, financial education, case management, or community engagement.
- Proficiency in English & Spanish
- Expertise in one of the following: financial services, financial planning, coaching/mentoring, social work, teaching, or other related fields.
- Strong interpersonal skills and a passion for supporting people with low incomes to build greater financial stability.
- Demonstrated knowledge of economic foundations, community health principles, and racial equity.
- Strong organizational skills with the ability to manage multiple projects and deadlines.
- Excellent oral and written communication skills, including workshop facilitation.
- Comfort working in diverse community settings including housing sites, schools, or partner organizations.
- Strong interpersonal skills and cultural humility when working with community members.
- Ability to work independently and as part of a team.
- Proficiency in MS Office Suite (Word, Excel, Outlook, PowerPoint); experience with case management or tracking databases preferred.
- Ability and willingness to travel and work occasionally in the evenings and on weekends.
- In-person work setting with required presence in HEC office.

Compensation

This is a full-time, non-exempt position (30-40 hrs. per week). After 90 days of continuous full-time employment, benefits including medical (after 60 days), dental, insurance, vacation, sick leave, major holidays and retirement plan are available.

The Health Education Council provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.

Receipt of Cover Letter and Resume: E-mail resume, cover letter (please write "RE:" Economic Well-Being Financial Coach on cover letter) and submit one original writing sample to:

E-mail: apply@healtheducouncil.org