

**Job Title:** Program Associate

**Organization & Mission**

Founded in 2005, Compass Working Capital, Inc. (“Compass”) provides financial coaching and savings programs that empower working, low-income families to build assets, achieve their financial goals, and become financially secure. Our broader vision is to build a leading, nonprofit financial services organization that promotes economic mobility and financial security for working poor families by influencing field-related practice and policy.

Compass is a dynamic, growth-oriented organization that values entrepreneurship, innovation, and excellence. A key element of the Compass culture is an unshakable belief that low-income families deserve high quality financial services. This belief is accompanied by a willingness to go above and beyond in providing these services to our clients.

**Position Description and Responsibilities**

The Program Associate is a critical role at Compass, as the primary interface between our organization and the clients we serve. Program Associates are members of the front-line team that work directly with low-income families to ensure that they reach their financial, educational and asset-building goals.

The ideal candidate will have: (1) the ability to connect and form strong and supportive relationships with low-income families from diverse backgrounds and ethnic communities; and (2) comfort with and/or interest in personal finance concepts and financial coaching.

Primary areas of responsibility include:

- *Financial coaching* (approximately 80%)  
The primary responsibility of this position is to provide ongoing financial coaching and guidance to help Compass clients set and reach their financial goals. Financial coaching activities generally focus on goal setting, budgeting, credit repair, and identifying opportunities to increase savings and income. Compass coaches also help clients successfully interact with financial institutions, service providers, and other community resources.
  - Every associate will strive to elevate the standard of coaching delivered at Compass. This includes: adopting a mindset of continuous improvement around coaching techniques and practices; adding to the organizational body of knowledge around specific content areas; and contributing to a positive learning environment for the entire team.
  - Every associate will manage confidential client information with a rigorous dedication to organizational security protocols around every aspect of client data. Activities associated with the management of client data include the creation and maintenance of client files, electronic data entry activities, direct communication with clients, and management of survey data, among others.
- *Workshop Coordination*  
Program associates will work with program managers to plan for and execute high quality financial education workshops. This activity might include communicating with prospective and current clients, preparing materials, scheduling presenters, and coordinating the administrative components of running the workshops.
- *Resource development and community partnerships*

Identify and refer participants to other resources and services needed to achieve their goals (for example: job training, homeownership counseling, small business development training, post-secondary education, etc.).

- *General program support, development, and review*  
Participate, as needed, in overall program development activities, including but not limited to strategy sessions with Compass staff and partners to drive and improve overall program performance.

### **Knowledge, Skills, and Personal Characteristics**

The ideal candidate will be a highly motivated, flexible team player with the following skills and characteristics:

- *Commitment to working, low-income families and the ability to form strong, supportive relationships with clients in a short period of time.* Demonstrated commitment to helping working, low-income families. Prior direct social service experience would be helpful. An understanding of financial issues related to low-income families, including public assistance programs, is a plus.
- *Familiarity with personal finance and comfort with quantitative calculations.* Though the position does not require financial expertise, the coaching is very heavily focused on financial content. As such, all candidates must have a strong comfort level with quantitative calculations and an interest in personal finance. Prior professional experience in the financial services industry is a plus.
- *Trustworthy, with outstanding interpersonal skills.* This position requires the ability to establish client trust in a short period of time. Compass also requires the highest ethical standards and integrity in service to our clients. The ideal candidate will also possess maturity, self-awareness and sound judgment.
- *Commitment to innovation, excellence, and entrepreneurship.* Energized to work in an entrepreneurial, growth-oriented nonprofit organization. Demonstrated commitment to testing and evaluating new ideas and to building a model organization. The ideal candidate will be a proactive team player, with a willingness to pitch-in to support larger goals.
- *Excellent organization and communication skills.* Detail-oriented with the ability to complete work accurately and efficiently. Effective oral and written communicator.
- *Educational background.* Bachelor's degree required.
- *Proficiency or fluency in Spanish or Haitian Creole a plus.*

### **Additional Information**

- Required hours might include a combination of workday, evening and weekend hours; schedule is designed to accommodate needs of working clients.
- Compass currently operates its core programs in Massachusetts, Connecticut, and Rhode Island; travel to all three communities may be required. We are specifically recruiting to fill positions currently open in Boston, MA; Providence, RI and Springfield, MA.
- Depending on program growth in 2015 and beyond, travel might also be required to additional communities.

To apply, please submit a resume and a thoughtful cover letter to: [apply@compassworkingcapital.org](mailto:apply@compassworkingcapital.org). Please identify the job title in the title of your email.

Compass is located in Boston's financial district at The Nonprofit Center, the first mission-based, multi-tenant center in Massachusetts created exclusively to house progressive social change organizations. For more information, please visit our website, [www.compassworkingcapital.org](http://www.compassworkingcapital.org).