

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

FAIR Program Impact Coordinator (Hybrid) \$19.00 - \$21.00/hour salary range

ABOUT THE POSITION

Prepare + Prosper (P+P) works hand in hand with Sunrise Banks, N.A., Member FDIC, to offer the FAIR products (checking, savings credit builder). These products work together to offer more control with less fees for low- to moderate-income people. FAIR meets people where they are at with a goal of financial inclusion for all.

The FAIR impact coordinator informs and implements the customer engagement plan from the point of first inquiry to post-enrollment support using the HubSpot CRM. The coordinator works with the FAIR team to develop creative and data-driven solutions to engage and support the FAIR customer in being successful. The coordinator works both internally across P+P's programs and externally with organizational partners to increase awareness and promotion of the FAIR program.

The coordinator promotes and incorporates diversity, equity, and inclusion in planning, decision-making, and program implementation to advance P+P's racial equity and economic justice commitment to address systemic racism and foster trust in supporting customers in building financial well-being. We value lived experience and those with lived experiences similar to the people in our programs.

POSITION AT A GLANCE



Our preferred candidate comes with an ability to build rapport with and sensitivity to issues and concerns of BIPOC communities and other marginalized groups. Strong skills in detail management and ability to multi-task.



This position works a hybrid model with a minimum of 2 days in our St. Paul office. Some evenings and weekends required.



This is a non-exempt, FT position with a comprehensive benefits package.



The office is located near University Ave and Hwy 280 in St. Paul with free parking and public transit options available.

WHAT YOU WILL DO

- Act as the lead user of the HubSpot CRM (training provided). Manage data systems to track the customer journey, identify inconsistencies, and make corrections or improvements.
- Work with program manager and evaluators to track and report program data.
- Ensure FAIR customer demographics are available on a routine basis.
- Provide monetary transfer transactions for customer accounts.
- Collaborate with a team to develop a FAIR policies and procedures manual, work plan, and maintain administrative functions and tasks.
- Provide excellent and responsive customer service by phone, text, email, and in-person.
- Provide secondary coverage for FAIR enrollments at 1:1, pop-up, and group enrollment events.
- Provide follow-up support and coaching to new FAIR customers.
- Serve as the customer advocate when liaising with FAIR's bank partner - troubleshooting account issues and representing customer needs and feedback.
- Track and resolve customer complaints.
- Work with manager to advance mutually beneficial referrals and outreach partnerships with organizations across the Twin Cities.
- Collaborate with a team to provide backup coverage for tabling, presentations, and events.
- Support manager in onboarding, training, and supporting the program enrollers.

- Collaborate internally with staff to ensure FAIR is successfully integrated into all P+P's programs through training and customized training tools.
- Support manager to onboard, train, and support FAIR distribution partners.

WORK ENVIRONMENT

- This position operates primarily in an office environment that is accessible.
- Work is performed in-person and remotely based on business needs. Occasional night and weekend hours are required.
- This role routinely uses standard office equipment.
- While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to move around the office and between offsite meetings; grab, move, and manipulate objects, and operate a computer.

HOW WILL YOU KNOW IF YOU ARE A GOOD FIT?

- Minimum of 2-year degree (e.g., associate degree) or 2 years of relevant work experience.
- Strong detail management and delivery of quality work.
- Experience with or adept at learning new technologies like computer relationship management (CRM) software and databases (position will use MS Outlook, Word, Excel and HubSpot).
- Ability to manage multiple projects and meet tight deadlines.
- Ability to quickly build rapport with and sensitivity to issues and concerns of BIPOC communities and other marginalized groups.
- Strong verbal and written communication skills -- including public speaking, relationship building, and community outreach.
- Have a clear understanding of income and wealth gaps (by economics, race, and gender), under-resourced, and inequity in communities.
- Creative; collaborative; interested in problem solving; driven to improve the experiences of customers and those financially marginalized.

WHY YOU'LL LOVE PREPARE + PROSPER

- Health, dental, life, and short/long term disability insurance
- Generous PTO accrual rate (19 paid days off for the first year of employment)
- 16 paid holidays (14 set days and two floating holidays)
- Retirement plan (SIMPLE IRA)
- Mileage reimbursed for work-related travel.

ABOUT PREPARE + PROSPER

Prepare + Prosper (P+P) is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. We are committed to the principles of diversity, equity, and inclusion in our work and are particularly interested in receiving applications from people of color and those with lived experiences similar to the people who use our programs. Learn more about P+P at prepareandprosper.org.

HOW TO APPLY

Please submit resume and cover letter by 05/02/2023 to jobs@prepareandprosper.org with the subject line "FAIR Impact Coordinator." Indicate in your email where you heard of the position opening. The anticipated start date is late May 2023.

OUR COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY

P+P continues to work towards a more inclusive workspace, and as such, we are an equal opportunity employer and do not discriminate against any employee or applicant for employment because of race, skin color, ethnicity, religion, gender, sexual orientation, national origin, disability, age, marital status, military status, pregnancy, or parenthood.