CROSSPURPOSE

Legacy Coach
2025 Job Description

Scope and Position Responsibilities

The Legacy Coach is responsible for providing case management and guidance to Fellows enrolled in the Legacy Fellowship. This role involves collaborating with external financial advisors, volunteer mentors (Coaches), and donors to CrossPurpose. The Coach ensures Fellows receive the support, direction, and resources needed to navigate challenges and achieve sustainable personal and financial stability.

Department: Legacy
Supervisor: **Legacy Program Manager**
Direct Reports: Up to 2

Major Areas of Responsibility

Key Responsibilities:

1. **Case Management:**
    - Manage a caseload of 80-100 Fellows, maintaining regular communication and providing holistic support.
    - Address barriers to personal and professional success through problem-solving, resource referrals, and conflict resolution.
    - Utilize motivational interviewing and long-term case management techniques to support Fellows' goals.
    - Maintain accurate case files and document progress using the department's data management system.
2. **Guidance and Support for Financial Stability:**
    - Provide direction and support to Fellows in addressing financial challenges, referring them to external financial advisors for in-depth coaching.
    - Encourage Fellows to engage with financial literacy resources and workshops provided by third-party partners.
    - Collaborate with external advisors to coordinate services and ensure Fellows are supported in achieving financial stability.
3. **Program Development and Implementation:**
    - Contribute to the design and improvement of case management strategies and methodologies.
    - Assist in creating program materials and resources for Fellows and Coaches.
    - Ensure alignment with the Legacy Fellowship’s objectives, timelines, and overall mission.
4. **Stakeholder Collaboration:**
    - Partner with Coaches, coordinating their involvement and ensuring their expertise aligns with Fellows’ needs.

- Facilitate meetings and communications between Fellows and Coaches, promoting productive mentor-mentee relationships.
- Serve as a liaison between Fellows and external financial advisors, ensuring Fellows receive expert financial guidance and resources as needed.
- Engage with donors and external stakeholders to enhance program support and visibility.

5. **Data Management and Reporting:**
   - Track and report on Fellows' progress and overall program outcomes.
   - Utilize data to identify trends and inform program enhancements.
   - Prepare regular reports for department leadership and stakeholders.
6. **Program Engagement:**
   - Active leadership, participation, and engagement during all event programming (Monday evening programs, Continuation, Graduations, etc).
   - Serving as a mentor coach during the Legacy Fellowship Course.

Qualifications

- **Education:**
  - Bachelor's degree in Social Work, Counseling, Organizational Leadership, or related fields.
  - Master's degree preferred, particularly in Case Management or related disciplines.
- **Experience:**
  - Minimum of 3-5 years in case management, coaching, or related fields.
  - Experience collaborating with external stakeholders, such as financial professionals, mentors, or donors.
  - Demonstrated success in supporting individuals through personal and professional development challenges.
  - Strong competence and fluency with financial concepts such as budgeting, credit building, and basic investment strategies. Knowledge of 401K strategies and home Ownership processes, with the ability to guide Fellows in accessing appropriate resources.
  - Previous experience working with underserved or economically vulnerable populations is a plus.
- **Skills and Competencies:**
  - Strong case management and coaching skills, including problem-solving and resource navigation.
  - Exceptional interpersonal and communication skills, with the ability to build trust with diverse populations.
  - Ability to coordinate effectively with external financial advisors to ensure Fellows receive appropriate guidance.
  - Basic understanding of financial literacy principles and tools, such as financial planning software or online budgeting platforms.
  - Proficiency in data analysis and reporting, with the ability to monitor trends related to financial outcomes.

- **Personal Attributes:**
  - High level of empathy and cultural competency to support individuals from varied backgrounds.
  - Strong organizational and multitasking abilities.
  - Commitment to the mission of CrossPurpose and the success of Fellows.
  - Willingness to learn and adapt financial concepts to better support Fellows in partnership with financial advisors.

Hours, Compensation, and Benefits

Hours: 40 hours/week this would include some evening hours

2025 Salary/Wage: $63,000 - $75,600 Annually (Coach III)

Vacation: 15 days per year, plus the office is closed Christmas Day - New Year's Day, and staff have limited duties

Sick Days: 6 days per year

Insurance Benefits: Health, dental, vision, workers compensation, unemployment, short-term disability, long-term disability

These and other benefits are discussed in more detail in our Employee Handbook.

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Employee **Date**