



## Job Description | IDA and Financial Capability Specialist

*This position is classified as **Non-Exempt and Full-Time**, reports to the **Family Economic Opportunity Program Director** and is a union position represented by CWA Local 7901. CASA of Oregon is located in Sherwood, OR.*

**Please Note: This position is for a limited duration due to grant funding and runs through December 2026. The position may be extended based on continued funding.**

**This position is a Grade 4 with a starting salary range of \$54,789 - \$64,390**

**Department Director: Rebekah Bassett, [rebekah@casaoforegon.org](mailto:rebekah@casaoforegon.org)**

### **POSITION OVERVIEW**

The principal responsibilities of the IDA and Financial Capability Specialist are to facilitate the delivery of Individual Development Accounts (IDAs) and financial capability tools and resources for residents of our manufactured housing communities and to members of the public. The person in this role will build relationships with the TA Managers, board members and residents of the manufactured housing communities that we assist to educate them on the services available. They will build relationships with other organizations and educational institutions to share resources and information as it relates to IDAs and financial capability services. They will recruit, enroll, assess eligibility and coach interested participants through the program. Additionally, they will provide one-on-one and group opportunities, both in person and virtually, for financial education, coaching, resource sharing and financial assessment. This person will participate in community meetings as a representative of CASA of Oregon and needs to be comfortable with public speaking. This position requires frequent travel across the state, will require some overnight travel for training and conferences, and will require occasional in office work to meet with clients and others.

### **PRIMARY DUTIES and RESPONSIBILITIES**

#### **IDA Specialist .75 FTE**

- Work with regional higher education institutions, area nonprofits and TA Managers/Boards of CASA's participating resident owned communities to provide outreach, marketing and recruitment for the IDA program
- Develop, enhance and distribute outreach materials, in coordination with CASA's Communications team and FEOP program staff
- Engage with potential applicants to apply for the IDA program, review eligibility criteria and submit applications for approval. Potential enrollment of 30-40 new applicants per year.
- Provide ongoing case management support for IDA participants, including but not limited to monthly points of contact, coordinating resource referrals, facilitating the completion of required documents, and assisting savers to program completion. Ongoing case management portfolio will fluctuate between 50-75 savers.
- Develop and maintain ongoing relationships with community partners
- Complete necessary data entry, create and maintain reports and queries using our program CRM Outcome Tracker
- Collaborate with program staff and partners on the review and revision of existing forms and protocols for effectiveness and modernization

- Work collaboratively and inclusively with internal and external stakeholders to imagine possibilities, solve problems, innovate, and grow the program
- Stay up to date on topics related to asset building including attending training and regional meetings

### **Financial Capability Specialist .25 FTE**

- Maintain a strong understanding of the principles of financial coaching, financial capability and the needs of our clients that could be served by financial capability tools and resources. These approaches should include those that are culturally competent, prioritizing equity and lived experience, principles of behavioral economics and trauma informed practices to decrease shame and increase discernment in making financial choices
- Provide financial coaching to clients in group and one on one settings, both in person and virtual
- Representing CASA of Oregon in public spaces including community events, resident meetings, partner engagement activities, etc.
- Build and maintain strong relationships with financial institutions for client referrals, volunteer recruitment, program support and other strategic engagements.

### **QUALIFICATIONS**

Education/Experience: AA or BA/BS in human or social services, community development or related fields preferred. Lived experience and work history may be a substitute for formal education. At least three years of experience in nonprofit program service delivery, case management, training, education or other relevant work experience.

NOTE: A combination of education/training/work experience demonstrating general qualifications for the position may be accepted in lieu of degree requirement.

### **ADDITIONAL REQUIREMENTS**

- One year of experience working as a financial coach or providing advisement related to credit reports and scoring, budgeting, cash flow, basic investments and basic financial principles
- Certification to provide financial education or the ability to complete certification
- Have a passion for working to improve the economic opportunities of low-income people
- Have experience working with people from diverse backgrounds
- Be diplomatic, patient and possess good listening skills
- Demonstrate excellent written and oral communication skills
- Be detail oriented and able to think critically
- Have the ability to manage multiple priorities
- Be organized
- Be able to work independently and as part of a team
- Have an overall friendly demeanor and enjoy working with the public
- Demonstrate ability to use advanced excel functions, word processing and database programs
- Be comfortable both leading and accepting direction
- Be creative and be able to think outside the box
- Be flexible in work schedule, including ability and willingness to work evenings and/or weekends
- Bicultural and/or Bilingual is a plus, Spanish speaking highly desired

- Experience and familiarity working with Individual Development Accounts is a plus

## **WORK ENVIRONMENT**

- Work is in an indoor, office setting. May occasionally require meeting at or visiting project sites in various settings throughout the state.
- This position requires occasional travel both in state and to training and/or conferences out of state, which may include day and evening work.
- CASA's work culture is inclusive, equitable, and collaborative. CASA makes transparent and shared decisions and cultivates staff through professional development.
- CASA encourages and supports staff involvement in both internal and external committee work during regular work time. Internal committees include: Equity Committee, Health, Safety & Wellness Committee, Sister Adele Scholarship Committee and Fun Committee.

## **PHYSICAL AND SENSORY CAPABILITY REQUIREMENTS**

*The following capabilities are required in order to perform the essential functions of this position. Reasonable accommodations that do not create an undue burden on the company are available to address the following requirements:*

- Ability to: stand, walk, reach with arms and hands, climb or balance, and to stoop, kneel, crouch or crawl;
- Lift, carry, and place items of up to 25 pounds;
- Maintain sustained concentration on computer screens;
- Use keyboards and a variety of computer peripherals

CASA is an equal opportunity employer. All applicants will be considered for employment regardless of race, color, religion, sex, sexual orientation, gender identity, national origin and veteran or (dis)ability status. CASA of Oregon also complies with federal and state (dis)ability laws and makes reasonable accommodations for applicants and employees with (dis)abilities. If reasonable accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact the department director.

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