**FINANCIAL EDUCATION INSTRUCTOR**

**Contract Scope of Work**

**Purpose:**

TCAA is seeking qualified Instructors to plan and deliver financial education workshops and one-on-one coaching services for adult clients of its programs. This is a part-time, intermittent contract role.

The successful vendor will facilitate financial education workshops and provide one-on-one guidance using a pre-approved curriculum. Participants will include marginalized adults such as those who are living in poverty, residing in emergency shelter, chronically underemployed, and/or are from communities of color.

The preferred vendor will have the ability to work on a part-time basis as an independent contractor, and will possess professional certification in financial coaching, financial counselor or educator, or similar credentials. Bilingual (English/Spanish) is preferred.

**Essential Functions:**

* Recommend an appropriate financial education curriculum specifically designed for the targeted populations.
* Plan, schedule, promote, and teach financial education workshops.
* Provide one-on-one supplemental financial coaching to workshop participants.
* Empower participants with resources and actionable information on ways to manage expenses, increase generational wealth and maximize income.
* Equip participants with financial literacy that will enable them to be better prepared for specific financial roadblocks, which, in turn, decreases the chances of personal, repeated economic distress.
* Assist workshop attendees in completion of written actionable plans to manage expenses, build savings, and advance in financial goals.
* Administer pre- and post-workshop surveys to measure gains in knowledge, skills, and confidence.
* Maintain documentation on workshop and individual session attendance.
* Meet monthly with TCAA to discuss, plan, and assess financial education and literacy services.

Financial education and literacy workshops will occur on a scheduled, bi-weekly basis at TCAA sites in Tempe, Arizona, for a maximum of 10 hours per week. The training(s) should be interactive and use multiple instructional methods. The instructor shall provide workshop materials and supplies for each course and attendee. The training should focus on topics that will assist participants with improving financial risk resiliency, such as:

* understanding financial values
* setting a spending and savings plan
* developing a financial security action plan
* cash-flow management
* credit reports and scores
* building an emergency savings
* borrowing basics and debt management

Coaching sessions are one hour in duration and will be held at TCAA sites or nearby public locations with participants who request additional guidance to apply the curricula to their own situation. A maximum of 8 one-hour coaching sessions will be conducted per month.

**Minimum Qualifications:**

Vendors performing contract services should have the following:

* Experience designing, selecting, and/or delivering financial literacy training courses for the targeted population using multiple instructional methods
* Experience working with adults and senior citizens preferred
* Demonstrated academic or professional training and education in finance or a related field preferred
* A background working with diverse and poverty populations required
* Accredited Financial Counselor, Financial Fitness Coach, or Financial Planner desired
* Current Level One Fingerprint Clearance Card
* Bilingual (English/Spanish)

**To apply**, email a cover letter and CV **before August 26, 2024** to: [humanresources@tempeaction.org](mailto:humanresources@tempeaction.org)