



Client Intake Specialist
AmeriCorps Member Service Description

Site: United Way Center for Financial Stability
Length of commitment: 1-2 years
Service Hours: One service year / minimum 1700 hours
Primary Supervisor Title: Financial Stability Coordinator
Living Allowance: \$ 11,800/year+ health & childcare benefits + \$5,350 education award
Scheduling: Minimum 35-40 hours/week
Location: 1500 NW 12TH Avenue, Miami, FL 33168

POSITION OVERVIEW

The Client Intake Specialist will aim to connect working individuals and families with services offered at the United Way Center for Financial Stability by providing high-quality customer service and following client intake procedures.

PRIMARY RESPONSIBILITIES

1. Provide social and asset building services:

Tasks:

- Screen clients for benefits, eligibility and application through conducting and coordinating client intake and evaluation
- Provide clients with credit score/history retrieval, analysis and basic financial development tools and services
- Educate clients about the financial education opportunities provided such as financial workshops and seminars offered at UWCFS and services such as Individual Development Accounts (IDA) and their benefits
- Provide VITA Free Tax Preparation services
- Support the Financial Stability Coordinator in ensuring clients' physical and electronic files are accurate, up-to-date and secure
- Follow-up with clients as indicated by the procedures of certain services
- Enter and update data in the system to ensure maintenance of accurate data
- Prepare reports as necessary or required by the management

2. Develop and maintain relationships to enhance outreach among all communities served:

Tasks:

- Participate in expanding outreach activities and events for clients and partners
- Promote all activities provided at UWCFS by building relationships with businesses, schools and other community members in surrounding areas
- Proactively involve in planning and developing outreach efforts
- Identify and attract potential clients to increase name awareness within the communities served
- Participate in events or activities organized by the UWCFS or partner organizations as needed
- Identify additional needs for the community and develop or suggest implementation

QUALIFICATIONS SOUGHT

Education Level: Associate's, Undergraduate or Master's degree students or graduates. Successful completion of freshman year is required. Minimum 2.8 GPA is required at the associate's and undergraduate level.

Majors Desired: Business, Accounting, Finance, Math and Science, Social Work, Marketing or related fields.

Abilities and Skills:

- A strong passion for helping individuals, families and communities pursue financial stability.
- Able to understand and evaluate a variety of personal finance issues.
- Must possess time management, critical thinking and organizational skills.
- Reliable transportation: position requires commuting to trainings, some of which may be on evenings or weekends.
- Strong work-ethic and decision making skills to be able to develop specific goals and plans to prioritize, organize, accomplish work and adhere to Code of Conduct and Confidentiality policies of SFLUM.
- Knowledge of and comfort with computers and basic software including Internet Explorer and Microsoft Office and able to learn new programs as needed.
- Proficiency in written and spoken English necessary, Spanish and/or Creole ability desired.
- Able to deal with problems involving a few concrete variables in standardized situations.
- Experience in non-profit sector preferred and especially client services or case management preferred.
- Eagerness to learn and grow by participating in various trainings and learn new skills.

Knowledge:

- **Customer and Personal Service** — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- **Sales and Marketing** — Knowledge of principles and methods for showing, promoting, and selling products or services.
- **English Language** — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Spanish and/or Creole speaking ability desired but not required.

WORKING CONDITIONS

The work is performed either in regular office conditions (90%) or conducted in various parts of the Miami-Dade County at partner and program locations (10%). Evening and some weekend work is required. Reliable transportation is expected in order to fulfill normal duties.

EXPECTATIONS AND ACCOUNTABILITY

Due to the nature of the profession, the Client Intake Specialists will be asked to participate in a variety of trainings and certifications related to financial and social services.

The AmeriCorps Member will be held accountable setting specific goals and achieving them during the period of service. The goals will be set during the orientation phase through the learning & service contract.

Adherence to Standards and Policies: Continuously smiles and greets pleasantly. Takes ownership of situations and problems and finds solutions to correct them. Always looks the part and behaves professionally. Responds to client needs immediately. Show initiatives and takes the leadership of projects/tasks.

PROGRAM DESCRIPTION

The United Way Center for Financial Stability (UWCFS) opened its doors in October 2009. UWCFS brings together more than 14 local agencies under one roof to offer wide array of tools and resources to help working individuals and families achieve greater financial stability and move forward toward financial independence.

The UWCFS aims to help working individuals and families who struggle to make ends meet to learn how to secure their future by developing personalized plans to increase their income, build savings and ultimately build assets such as pursuing higher education, acquiring a home and building a retirement fund and so forth. The UWCFS focuses on long-term outcomes with a systematic approach to financial stability.

The UWCFS is housed and operated by South Florida Urban Ministries (SFLUM), which is a 501(c)(3) nonprofit organization founded in 1973 by the local United Methodist Churches to be a catalyst and a partner in the pursuit of social justice and the development of compassionate community ministries. SFLUM sponsors ministries that reach out to children and youth, families in need, and low income entrepreneurs. Together with local churches, businesses and community organizations, SFLUM makes a profound impact in the lives of individuals by fostering self-development and the fulfillment of personal goals.

Learning Outcomes:

The AmeriCorps member will not only serve the community, but will also develop professional skills in areas such as management, problem solving, customer service, professional etiquette, marketing and financial management. The individual will have a hands-on learning and service experience in a non-profit organization setting and will have the opportunity to make a big impact on the communities served.

To learn more about our mission and programs or to apply for the position, please visit: www.sflum.org
To learn more about the mission and benefits of AmeriCorps Program, please visit: www.americorps.gov



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