



Economic Development Services Specialist



AmeriCorps Member Service Position

Program: Branches Program

Location/Site: All SFLUM sites

Primary Supervisor: Branches Program Site Coordinator

Length of commitment: Min. 1- Max. 2 years

Service Hours: One service year & minimum 1700/year

Scheduling: 35-40 hours/week, some sites require 20 hours/week

Living Allowance: \$ 11,800-13,000/year+ health & childcare benefits + \$5,350 education award

Start Date: August 1, 2010

Scope of the Position: The AmeriCorps member will aim to make a fundamental impact on working individuals and families achieving greater financial literacy and economic development by providing wide-range of services with a holistic approach to empowering people to move from poverty to prosperity.

Essential Responsibilities:

1. Provide direct services in areas of finances, health care and other available resources such as free tax preparation:

Tasks:

- Develop and conduct client intake and assessment procedures
- Analyze information obtained from clients to determine methods and services for meeting clients' needs
- Connect clients with opportunities such as personal finance, literacy, parenting classes offered at all SFLUM sites, including United Way Center for Financial Stability or at partner agencies.
- Interview clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop a financial plan when necessary.
- Answer clients' questions about the purposes and details of personal financial management and methods.
- Review clients' accounts and plans regularly to determine whether life changes, economic changes, or financial performance indicate a need for reassessment of services provided or needs for a longer-term plan.
- Recommend and develop financial literacy tools, seminars or connect clients with organizations that provide and implement financial planning or other services needed.
- Lead the VITA tax preparation services for the site.
- Coordinate and assist with Thanksgiving Meal Delivery Program and Emergency Services Network.

2. Educate clients through one-on-one and group interactions or trainings and marketing of services offered to increase awareness:

Tasks:

- Develop and maintain client base, keeping current client plans and information up-to-date and recruiting new clients on an ongoing basis.
- Conduct needs assessments, surveys and informal evaluations to identify additional opportunities and additional services to be provided to clients, students of Branches program and their families such as Food Pantries/Banks.

- Participate in events, develop outreach materials, brochures, newsletters and so forth to increase awareness of services and SFLUM in all communities served.
 - Measure impact of the services to ensure that outcomes are aligned with SFLUM's mission and goals.
 - Create a follow-up process for the site to maintain relationships with all clients served to ensure long-term impact.
3. Develop and maintain relationships to enhance communication among all SFLUM sites and partners or potential partners.

Tasks:

- Build and maintain relationships with businesses, community partners, agencies, schools and other potential support groups to secure resources for clients, to create partnerships with organizations and opportunities such as Food Banks.
- Identify and develop relationships with potential partners or service providers that are beneficial to SFLUM clients.
- Coordinate services and offerings among all SFLUM services by identifying clients' needs and offering them to clients.
- Maintain close communication with SFLUM Economic Services Coordinator and Branches Sites.

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

Skills/Abilities:

- A strong passion and empathy to help individuals, families and communities to achieve financial stability.
- Excellent interpersonal skills to deliver high-quality customer service.
- Strong work-ethic, decision-making, critical thinking, organizational skills to be able to develop specific goals and plans to prioritize, organize, meet deadlines and accomplish work and adhere to high professional and ethical standards.
- Ability and desire to learn new skills and gain knowledge in various areas of tax preparation, personal finance management, economic services delivery and needs of the clientele served.
- Ability to understand and evaluate a variety of personal finance issues.
- Creative and proactive thinking to enhance services provided and to develop new opportunities and tools for the clients.
- Must be a self-starter, goal oriented, success driven individual with an entrepreneurial spirit to be able to work with little supervision, identify and create opportunities to enhance the offerings and build relationships.

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 in office/classroom conditions (80%), however during events, community relationship building visits to surrounding organizations, families and other sites may require some traveling (20%). Some evening and weekend work may be required. Mostly weekdays (80%) may require some evenings or weekend hours (20%).

Reporting:

Position is part of the Branches program team; therefore, position will require collaborating with kids and participation in team activities. The position directly reports to the Site Coordinator, however will require close collaboration with SFLUM Economic Services Coordinator.

Expectations & Accountability

The Economic Development Services Specialist is expected to be the bridge builder, marketer and communicator among partners, all SFLUM sites and services offered that are tailored to empower people to move from poverty to prosperity. The specialist will be expected to play a key strategic role in providing all-encompassing services to our clients. Therefore, the individual holding this position will be held accountable for marketing, development, communication and administration of services beneficial to client's enhancement of quality-of-life and to achieve greater financial stability.

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.

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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