



## Economic Development Services Associate



### AmeriCorps Member Service Position

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| <b>Direct Supervisor:</b> Economic Services Coordinator  |
| <b>Length of commitment:</b> Min. 1- Max. 2 years  |
| <b>Service Hours:</b> One service year & minimum 1700/year                                     |
| <b>Schedule:</b> 35-40 hours/week  |
| <b>Living Allowance:</b> \$ 12,300/year+ health & childcare benefits + \$5,350 education award |
| <b>Start Date:</b> August 1, 2011  |

**Position Summary:** AmeriCorps member will aim to make positive 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. One of the main responsibilities will include leading the tax services at designated sites as the VITA Program Site Coordinator during tax season. VITA (volunteer income tax assistance) is an IRS sponsored program that prepares tax returns for low income families.

#### Main Responsibilities:

##### 1. Direct Services:

Provide direct services in areas of finances, health care, government benefits and other available resources:

- 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 and/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.
- Coordinate and assist with Thanksgiving Meal Delivery Program and Emergency Services Network.

##### 2. VITA Program Management:

Lead the VITA tax preparation services for the designated site as the VITA Site Coordinator.

- Attend trainings to become certified by the IRS to prepare tax returns.
- Prepare and manage the tax preparation for clients
- Take appointments and schedule clients
- Recruit, coordinate and manage volunteers at VITA site
- Market the services and outreach to various community businesses for potential tax clients

### 3. Outreach:

Educate clients through one-on-one, group interactions, events or trainings and cross-promotion of services offered to increase awareness.

- 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.
- Participate in events and updating outreach materials, brochures, newsletters and so forth to increase awareness of services and SFLUM in all communities served.
- Collect outcomes are aligned with SFLUM's mission and goals.
- Follow-up with all customers to ensure satisfaction and to maintain relationships with all clients served to ensure long-term impact.
- 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, cross promote offerings among all SFLUM services by identifying clients' needs and offering them to clients.

### Qualifications

#### Education and Experience:

- Associate's, Undergraduate or Master's degree in Business, Accounting, Finance, Math and Science, Social Work, Marketing or related fields.
- Successful experiences in
  - helping individuals, families and communities in economic development services.
  - non-profit or ministry setting is preferred
  - client services or case management preferred.

#### Knowledge, Skills, Abilities:

- A strong passion and empathy to help individuals, families and communities to achieve financial stability.
- 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.
- **English Language** — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- **Sales and Marketing** — Knowledge of principles and methods for showing, promoting, and selling products or services.
- **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.
- **Clerical** — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, designing forms, and other office procedures and terminology

- **Active Listening** — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times
- **Critical Thinking** — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems
- **Judgment and Decision Making** — Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- 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%). Mostly weekdays (80%) may require some evenings or weekend hours (20%).

### Work Style and Values:

This position operates within a ministry that is committed to providing opportunities to individuals, families and communities in an empowering, ethical and sustainable manner. Candidates should be able to embody this ethos and should pose the following traits:

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| ✓ <b>Dependability</b>            | ✓ <b>Self Control</b>  | ✓ <b>Relationships</b> —Co-workers, Moral Values and Social Service. |
| ✓ <b>Attention to Detail</b>      | ✓ <b>Analytical Thinking</b>                                     | ✓ <b>Achievement</b> — Ability Utilization and Achievement.          |
| ✓ <b>Cooperation</b>              | ✓ <b>Independence</b> — Creativity, Responsibility and Autonomy. |  |
| ✓ <b>Initiative</b>               |  |  |
| ✓ <b>Integrity</b>                |  |  |
| ✓ <b>Adaptability/Flexibility</b> |  |  |
| ✓ <b>Leadership</b>               |  |  |

### Standards of Performance:

South Florida Urban Ministries upholds high ethical standards and maintains strict confidentiality in every aspect of its operations and expects the same from each employee. Therefore, strong ethical standards and high personal and professional values are expected to be exhibited by all employees with access to sensitive and confidential information.

The STAR customer service program of South Florida Urban Ministries upholds high standards of customer service for each and every stakeholder every day. Excellence, perseverance, passion, innovation and compassion are the “EPPIC Philosophy” that under girds STAR at SFLUM. By living out the EPPIC Philosophy and upholding STAR standards, each staff member becomes an important part of our success and impact.

To learn more about our mission and programs or to apply for the position, please visit: [www.sflum.org](http://www.sflum.org)

To learn more about the mission and benefits of AmeriCorps Program, please visit: [www.americorps.gov](http://www.americorps.gov)



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