



**Financial Stability Associates
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/ Financial Coach
Living Allowance: \$ 12,300/year+ health & childcare benefits + \$5,350 education award
Scheduling: Minimum 35-40 hours/week
Location: 11500 NW 12 TH 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 STAR* customer service, learning the needs of the clients, and services available and by following client intake and referral procedures.

PRIMARY RESPONSIBILITIES

1. Direct Service

Provide social and asset building services:

- 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), Ways to Work 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 Outreach and Client Education

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

- 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 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, Abilities and Skills:

- **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.
- **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.
- **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 a plus.

Work Style:

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:

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

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.

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%). Some evening and some weekend work may be required. Reliable transportation may be needed as the position requires commuting to trainings, some of which may be on evenings or weekends.

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 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. South Florida Urban Ministries is a dynamic non-profit organization focusing on holistic child, youth and family development, small business development and hunger relief ministries in South Florida. Our mission is to serve, educate and empower people by partnering with volunteers, congregations, and organizations to make a lasting impact in people's lives and communities.

Service 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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