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| Job Title: | **Financial Management Services Budget Housing Coach-PT** |
| Department: | **Community Services** |
| Reports to: | **FMS Manager** |
| Grade: | **DSP** |
| Supervises: | **N/A** |
| FLSA Status: | **Non-Exempt** |
| Prepared by: | **Latitia Stave** |
| Date: | **February 3, 2021** |
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| Purpose:To strengthen NMCAA communities by empowering people to improve the quality of their lives through client advocacy, casework and education, and Financial Management Services public relations. |
| Essential functions:***Customer Advocacy and Casework**** Evaluate customer need for Financial Management Services (FMS) Program by phone, walk-in, or appointment.
* Conduct pre-screening and application processing for Financial Management Services Program.
* Maintain an understanding of all programming to provide referral. Provide customer with extensive case-management assistance, maintenance of customer files in database complete with case notes as appropriate in one or more of the following areas in partnership with other Budget/Housing Counselor:
	+ Case management Budget Counseling
	+ Homeownership (first-time homebuyer)
		- HUD Comprehensive Housing Counseling Program
		- MSHDA Homeownership Counseling Program
	+ Family Self-Sufficiency (FSS)
	+ Individual Development Account (IDA)
	+ Foreclosure Prevention Counseling
	+ Support to homeless prevention case management
* Populate/maintain client billing databases and tracking.

**Financial Management Services Public Relations*** Responsible for promoting good PR in the community through public speaking to inform the general public of NMCAA services.
* Present at outreach activities in the community, for example Saturday Specials and Project Connect, program presentations, booths at fairs or expos, and educational sessions.
* Utilize media (newspaper, radio, TV) and distribute/publish PR materials as needed for promotion of Financial Management Services Programs and Workshops.
* Maintain regular contact with customer groups and/or groups representing customer needs assessment and feedback on Financial Management Services Programs.

**Customer Education*** Teach courses in Financial Fitness Curriculum and Homeownership including pre-purchase for first-time homebuyers, financial management and home maintenance workshops monthly.
* Review/update curriculum annually with FMS staff.
* Manage educational environment including attendance records, evaluations, and special events.
* Distribute financial management and housing packets.

**Other*** Participate in staff meetings and training sessions as required.
* Meet all relevant ROMA performance targets and goals and objectives of the Agency’s CSBG Work Plan, or other service contracts.
* Submit Programmatic reports as required.
* Complete other duties as requested.
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| Position Objectives:To effectively and efficiently deliver FMS education and counseling and to represent the agency in a professional, friendly, and carding manner. |
| **Measured by:*** Annual performance reviews
* Annual ROMA reports
* Ongoing assessment.
* Cooperation with and feedback from coworkers.
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| **Minimum Education:*** BA in human services field, or equivalent.
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| **Minimum Experience:*** Experience with low-income and/or at-risk individuals with low-income financial issues or homeownership counseling/ education.
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| **Essential Abilities:*** A commitment to the NMCAA philosophy and mission.
* Ability to maintain confidentiality.
* Ability to interact positively with co-workers and clients in a non-judgmental, tactful and courteous manner.
* Ability to suggest innovative approaches in completing job responsibilities.
* Ability to work openly and cooperatively as a team member.
* Ability to perform physical tasks to carry out specific job duties.
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| **Minimum Skills Required:*** Experience with low-income and/or at-risk individuals with low-income financial issues or homeownership counseling/ education.
* Utilize excellent communication skills in individual and group settings, good organizational skills, self-motivated, able to multi-task, ability to work independently and as an effective team member and have a commitment of the NMCAA mission.
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| **Minimum Physical Expectations:*** Physical activity that requires extensive time working on a computer, keyboarding, sitting, and phone work.
* Physical activity that requires travel: car, train, and/or air.
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| **Minimum Environmental Expectations:*** This position operates in an office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.
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