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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. | |
| 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. | |
| **Minimum Education:**   * BA in human services field, or equivalent. | |
| **Minimum Experience:**   * Experience with low-income and/or at-risk individuals with low-income financial issues or homeownership counseling/ education. | |
| **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. | |
| **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. | |
| **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. | |
| **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. | |