



# SAMARITAN HOUSE



## POSITION DESCRIPTION

Position Title:	<b>Financial Empowerment Specialist</b>
Candidate:	VACANT
Department:	Client Services
Supervisor:	Financial Empowerment Manager
FLSA:	Full Time/Hourly/Non-Exempt
Wage:	\$35 per hour
Effective Date:	08.01.2020

Under the general supervision of the Financial Empowerment Manager, the Financial Empowerment Specialist will focus on assisting their supervisor with the implementation, administration and delivery of the Financial Empowerment Program Operations and Services to Samaritan House clients. Programs include but are limited to Client Financial Coaching, Education and VITA Tax program. All positions within the Financial Empowerment program are grant funded and driven. Candidate should be cognizant that Financial Empowerment Program positions would conclude should the funding be discontinued for any reason.

## JOB QUALIFICATIONS

**Please note our preferred and in some cases required qualifications for this position:**

### Education and certifications –

- Bachelor or Master Degree in Social work or related field
- Financial Coach Certification required – AFC, FFC, or other related certification to Financial Coaching- Certification can be either already attained or actively in progress of attaining

### Experience- Minimum 2 years of experience in the following:

- Financial Empowerment/Financial Coaching experience required
- Case Management experience is required
- Experience working with public, non-profit or other community organizations. Non Profit programming experience and familiarity with impoverished populations and associated service needs
- Inter-Agency or community collaborations

### Other Skills and Expertise -

- Bilingual and Bicultural English and Spanish highly preferred.
- Excellent Computer Proficiency with Microsoft Office Suite to include database entry and information management systems. Ability to quickly learn various computer programs, applications and databases. Knowledgeable with use telecommunication applications as assigned- zoom, skype etc.
- Strong Analytical and Data Management skills with ability to maintain accurate detailed hard copy files and electronic database files timely; as well as the ability to collect, enter, analyze and report program data information and produce reports as requested.
- Excellent Communications Skills. Ability to communicate effectively both oral and written; bilingual/bicultural proficiency in English and Spanish desired but not required. Ability to understand and follow oral and written instructions in an independent manner.
- Demonstrated ability to exercise appropriate and sound judgment and professionalism with tact and diplomacy both under normal and stressful situations.

- Excellent conflict management skills and crisis management experience.
- Excellent ability to deliver solutions based approach to problem solving in a timely manner. Ability to be creative and show initiative.
- Strong organizational and time management skills, strong multitasking skills. Must be able to successfully manage various projects, remain detail oriented as well as maintain and manage accurate records, documentation and files in a timely accurate fashion and be able to prepare any necessary data or reports requested. Must be able to learn quickly and appropriately arrange competing priorities.
- Ability to establish and maintain successful and effective relationships with Samaritan House constituents. Must be able to work independently and collaboratively within a team.
- Proven ability to conduct all business and interactions with all constituents in a highly ethical manner demonstrating high level of integrity. Strong ability to maintain confidentiality, comply with HIPPA privacy requirements and maintain appropriate professional boundaries with all constituents.
- Ability to follow Agency Policies and organize required activities according to Samaritan House policies, procedures and best practices which include any related federal, state, or local agency requirement.
- Ability to independently travel to agency locations- must have dependable transportation with insurance, and a clean driving record.
- Ability to meet deadlines and complete all work in a timely manner (within required deadlines).
- Ability to work flexible schedules, including evenings, holidays and/or weekends as needed.

#### WORK ENVIRONMENT

References and back ground checks will be conducted by Samaritan House prior to employment. You must have the physical, visual and auditory ability to perform the essential functions of the job, ensure a safe/secure work environment and respond to any emergencies with or without reasonable accommodations. Regular and repeated use of motor coordination and hand motions for filing, computer data entry and writing. Candidate should have the physical ability to occasionally lift and/or move items (approximately 20 lbs.). Occasional sitting, walking, carrying, reaching, speaking, listening for extended periods of time. Work environment can be high stress and fast paced. This position will require use of company mobile devices under normal conditions: laptop and cell phone.

Pandemic Altered Operations- This position will operate both on site and remotely during the COVID Pandemic. All client contact will be through telecommunication methods and not in person. While on job site, all employees are required to wear masks and the practice of social distancing and appropriate sanitation protocols is required at all times.

#### ESSENTIAL FUNCTIONS OF THE JOB

**A. Deliver consistent, high quality services at all times within Samaritan House Values, protocols, legal regulations and within professional boundaries. Services are to be provided in person unless under Pandemic Operations where social distancing orders are to be followed and telecommunications used to connect for client service delivery.**

- Assist with Volunteer recruitment and management as directed by the Financial Empowerment Program Manager and in collaboration with the Volunteer Dept .
- Collaborate with appropriate outside service contractors providing services to the program.
- Support the professional growth of volunteers, maximizing their potential in their positions; Research training opportunities, and facilitate/conduct volunteer training as needed.
- Support supervisor in ensuring accurate understanding and implementation by all volunteers and any outside service contractors of policies, procedures and best practices through various methods, as directed by the program manager, including but not limited to group and individual meetings; maintenance of policy/procedures manuals as needed; checklists; timely and appropriate documentation of non-compliance with policies, procedures and best practices; and appropriate programmatic corrective actions.
- Support supervisor by ensuring the accurate and timely collection of statistical data for all programmatic operations as well as its reporting to the development staff, and other interested persons.
- Assist in monitoring programs to improve client care/evaluation and customer service.
- Ensure that all clients are consistently and effectively Case Managed and treated fairly and equitably.

**B. External relations- Financial Empowerment Specialist will support all program efforts to maintain favorable relationships with those interested in or affected by the financial empowerment program, to include but not limited to:**

- Maintaining successful relationships with neighbors, politicians, city representatives, service provider networks, police, local business owners, and community members.
- Representation of Samaritan House professionally, positively and effectively at all necessary community meetings.
- Promote program efforts and work through attendance of Samaritan House friend and fundraising events as assigned.
- Collaborate with development department as needed for program and agency promotion including but not limited to preparing and submitting accurate and timely statistical reports; keeping development department informed of changes in collaborative services; write article for newsletters as requested by development department; identify individuals who would agree to be interviewed for a human interest story.
- Remain well-informed of industry trends and policy changes; serve as a liaison with other financial / asset development organizations.
- Attend appropriate meetings/trainings/events/functions to improve upon skills.

**C. Administrative Responsibilities should be performed timely and within assigned deadlines.**

- Ensure all programmatic data work and files (electronic and hard copy) are completed timely.
- Assist in the preparation of materials needed for grant proposals and requests and collaborate with development department for funding or marketing projects.
- Produce reports at various intervals as needed.
- Ensure all attendance forms are completely timely including but not limited to timesheets and PTO requests forms.
- Work in collaboration with the Director of Human Resources or the Associate Director of Volunteers for any human capital needs (volunteers/interns/staff/outside service contractors); operate the program in accordance with all laws, including wage and hour laws and laws prohibiting discrimination.
- Maintain flexible schedule.
- All work/business to be performed with appropriate professional boundaries, excellent ethics/integrity and in good faith.
- Report all incidents or on the job injuries immediately or within 24 hours whichever is sooner. Complete necessary incident report forms.
- Attend any assigned meetings or trainings as assigned. Represent Samaritan House professionally and successfully to any external contacts/constituents.
- All other duties as assigned.

#### HOW TO APPLY

Interested candidates for this position will be required to submit a cover letter and resume to:

SAMARITAN HOUSE Director of Human Resources  
4031 Pacific Blvd San Mateo, CA 94403  
E-mail: [hr@samaritanhousesanmateo.org](mailto:hr@samaritanhousesanmateo.org) Via facsimile: (650) 294-4336

No phone calls, please! Samaritan House is an equal opportunity employer. *Because of the volume of applications Samaritan House receives, we regret we are not able to respond to every applicant individually. If your skills and experience are a good match for this position, we will contact you for an interview.*

**ACKNOWLEDGMENT**

*Please sign below in acknowledgment that you have received and understand the job description of Financial Empowerment Specialist.*

\_\_\_\_\_  
Employee Signature                      Date

\_\_\_\_\_  
Supervisor Signature                      Date

\_\_\_\_\_  
Director of Human Resources      Date