



## Job Description

**Title:** Financial Stability Program Specialist

**Reports to:** Director of Community Services

**FSLA Status:** Non Exempt

**Job Status:** Full time

**Supervises:** None

**Summary:** The Financial Stability Program Specialist provides intensive case management services and financial education to individuals and families in need through financial strengthening programs. Provide direct service including needs assessment, intensive case management services, financial coaching, monitoring appropriate action plans, and information and referrals to internal programs and community resources. Implements the Catholic Charities Payday Loan Relief Program.

Possesses a strong commitment to the mission of Catholic Charities including the understanding of Catholic Social Teaching and ability to demonstrate the philosophy and values of the agency. The identity of the agency is clearly Catholic. As such, Catholic Charities adheres to the social and moral teachings of the Catholic Church.

### Essential Duties and Responsibilities

- Implements the Payday Loan Relief program, interfacing, collaborating, and facilitating the program with banking partners, payday loan providers, and clients.
  - Screen and assess potential clients
  - Process loan applications, in collaboration with banking partners
  - Engage directly with payday lenders to ensure that resources provided by banking partners are utilized to relieve client payday loan debt.
  - Provide wrap around strength-based case management for all assigned financial programming that includes completing assessments, developing a stabilization plan for all families and assisting clients in identifying and monitoring measurable and achievable goals with appropriate action steps.
  - Provide services including: budget coaching, credit coaching, financial education, etc.
  - Maintain confidentiality of all clients.
  - Monitor progress of families enrolled in the program through regularly scheduled visits.
  - Home visits may be required
  - Offer and host financial classes in a group setting, virtually or 1:1. This may require evenings.
  - Ensure accuracy and attention to detail in record keeping. Maintain case file for each client with appropriate documentation per guidelines and enter all necessary information into data system. Track and input data for service recipients and prepare monthly reports using monthly report form.



- Develop and maintain a strong knowledge base of Catholic Charities programming. Seek out and maintain community relationships to recruit potential candidates for financial stability programming and community resources. Provide assistance as needed through available internal and external referral. This may include public speaking and participating in community meetings and events.
- Regularly and effectively communicate with team members, supervisor and program participants.
- Work with Director of Community Services to expand programming as needed
- Other duties as assigned

### **Supervisory Responsibilities**

There are no supervisory responsibilities.

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and /or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and/or Experience**

A bachelor's degree in a human services field is require. An advanced degree from an accredited college or university in a field related to CCCNMO's mission and services is preferred.

Experience in strength-based case management with an emphasis on budget coaching and monitoring finances

Demonstrate knowledge of Catholic Social Teaching

### **Computer Skills**

Demonstrates proficient computer skills and familiarity of Microsoft Office software applications including Outlook, Word, Excel and PowerPoint. May also require the ability to use Access, and desktop publishing software as required. Ability to learn and effectively use various data collection and database management systems to record data as required. Demonstrates familiarity and proficiency with Internet tools and techniques for searching, extracting, and processing information.

### **Workplace Ethics**

Treats people with dignity and respect. Inspires the trust of others. Works ethically and with integrity. Maintains and safeguards confidential information. Possesses a strong commitment to the mission of Catholic Charities including the understanding of Catholic Social Teaching and ability to demonstrate the philosophy and values of the agency. The identity of the agency is clearly Catholic. As such, Catholic Charities' staff adheres to the social and moral teachings of the Catholic Church.

### **Communication Skills**

Exhibits good interpersonal communications skills including the ability to establish and set strong personal boundaries. Keeps others adequately informed and exhibits good team building abilities.



Expresses ideas and thoughts clearly in both written and verbal form. Exhibits good listening and comprehension skills; seeks clarification when needed and selects and uses appropriate communication methods. Ability to communicate and interact with a wide variety of people having diverse social concerns and problems. Ability to communicate the mission and services of Catholic Charities both within the agency and community.

### **Language Skills**

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports, business correspondence and procedure manuals utilizing proper English, grammar, punctuation and spelling; proofreads with accuracy and completeness to produce documents requiring minimal revisions by others. Ability to effectively present information and respond to questions from employees, managers, clients, and the public. Ability to respond professionally to common inquiries or complaints from customers, regulatory agencies, or members of the business community.

### **Mathematical Skills**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

### **Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

### **Certificates, Licenses, Registrations**

None required

### **Other Qualifications**

Ability to successfully pass a child abuse registry check and criminal background check, and requires completion of the Protecting God's Children VIRTUS training session.

Licensed to operate a motor vehicle and ability to meet agency auto insurance coverage requirements. Local travel required.

The work of Catholic Charities serves as an expression of the ministry of evangelization of the Roman Catholic Church by serving the poor and most vulnerable in our society. Although staff are not to proselytize, they are, however, expected to be guided in every way by the teachings of the Catholic faith in their daily work. These include church teachings on abortion, sterilization, abstinence, and the sanctity of the family as well as fidelity to the Catholic ethical religious directive of the United States Conference of Catholic Bishops. In addition, all staff are invited to attend periodic Catholic Masses. As employees of Catholic Charities, it is further expected that staff will adhere to the Diocesan code of



conduct. Employees are expected to not only perform duties consistent with the Doctrines of the Catholic faith, but outside of the workplace they are expected to refrain from publishing any communication in any form, electronic or otherwise, that affiliates them with Catholic Charities in a manner that is inconsistent with the doctrine of the Roman Catholic faith.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

**Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

I have read this job description and fully understand the requirements set forth therein. I understand that this is to be used as a guide and that I will be responsible for performing other duties as assigned. I further understand that this job description does not constitute an employment contract

Employee Signature \_\_\_\_\_  
Printed Name \_\_\_\_\_  
Date \_\_\_\_\_