



## Community Financial Center Navigator

### Description

Foundation Communities (FC) owns and operates two Community Financial Centers (CFCs) in Austin, Texas. At each CFC, community members and FC residents can access free tax services, health insurance enrollment assistance, college support services, financial coaching, and savings programs. The CFC Navigator is responsible for ensuring that every client who calls or walks into the CFC is able to easily access the service he or she is seeking. The Navigator is also responsible for connecting clients with other CFC services and ensuring strong referrals to and from partner organizations.

### Job Responsibilities

- Ensure every client who comes in the door can easily access the financial programs.
- Collaborate with CFC staff to facilitate and track internal referrals between financial programs.
- Create, manage, and maintain an effective referral system with partner organizations.
- Manage the appointment scheduling system to make sure clients schedule and show up for their appointments.
- Assist with client intake, including sign-in and intake questions.
- Manage the CFC phone line, including checking voicemail, returning phone calls with 24 hours, and forwarding messages to program coordinators or other FC staff as necessary.
- Ensure every client completes the exit survey and schedules their next appointment (if applicable) before they leave.
- Input data from the day's appointments and exit surveys into the client database.
- Conduct client follow-up as needed for each program.
- Pull data from the client database to identify client trends and opportunities to expand service delivery, as needed.
- Work with the Administrative Coordinator to address minor building issues (changing toilet paper rolls, cleaning up minor spills, etc.).

### Requirements

- Bilingual (English-Spanish)
- Customer service experience
- Experience providing or connecting people with social services highly desirable

### To Apply

Please send a cover letter, three references, and resume to [resumes@foundcom.org](mailto:resumes@foundcom.org). This position will pay \$15 per hour.

*Foundation Communities is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability, veteran status, sexual orientation & gender identity.*