

**Community Action Program of East Central Oregon  
(CAPECO)  
Job Description**

<b>Position:</b>	<b>MONEY MANAGEMENT SPECIALIST</b>
<b>Supervised by:</b>	Program Manager & Director of Programs
<b>Department:</b>	Services for Independence
<b>Classification:</b>	Regular Full Time
<b>Position Status:</b>	Non-Exempt
<b>Location:</b>	Main Pendleton Office
<b>Salary Level/Wage:</b>	Range 5 - \$1,897
<b>Benefits:</b>	Health, Dental, RX, Vision, FSA, Life Insurance, 401K Plan, Vacation, Sick and Holidays

**HOW TO APPLY:**

To apply for this position we must receive a completed CAPECO application. An application can be found by visiting our website at CAPECO-WORKS.ORG or picked up at our Main Office located at 721 SE 3rd Street, Suite D, Pendleton, OR 97801. Cover Letters and Resumes may also be included, but will not be accepted without an application.

Please return the completed application, optional resume, cover letter and any other required documents to: 721 SE 3rd Street, Suite D, Pendleton, OR 97801 or [hr@capeco-works.org](mailto:hr@capeco-works.org). Please send it attention Human Resources if you are sending by mail.

**POSITION OVERVIEW:**

This position will work with the Money Management team as a Representative Payee. The candidate chosen for this position will work with individuals who have been determined to need assistance with their finances and bill payments as determined by Social Security, Adult and People with Disabilities, and/or the Veteran's Administration. The majority of this position is spent on the computer and directly with clients. This position requires patience and understanding when dealing with what can sometimes be difficult and upset clients.

**ESSENTIAL JOB FUNCTIONS:**

An employee in this position may be called upon to do any or all of the following essential functions. These examples do not include all of the duties which the employee may be expected to perform. Other duties, responsibilities and activities may change or be assigned at any time with or without notice. To perform this job successfully, an individual must be able to perform each essential function satisfactorily with or without reasonable accommodation.

1. Work with clients on a one-on-one basis to maintain budget and determine possible weekly allotments.
2. Use Representative Payee Manager Software, on-line banking and computer on a daily basis to update clients' information and complete transactions.
3. Maintain client files accurately, ensuring appropriate documentation is present.
4. Manage client bills and issue payments according to policies and procedures.
5. Advocate on client's behalf with landlords, creditors, and legal system.
6. Pick up and distribute mail, as necessary.

7. Cover Reception position as needed- which includes answering the agency telephone, taking messages, and directing calls to appropriate programs/individuals.
8. Complete and maintain reports in a timely manner.
9. Attend trainings as assigned.
10. Work with all departments of CAPECO to provide wrap around services to participants.

## **REQUIRED KNOWLEDGE, SKILLS, ABILITIES & MINIMUM QUALIFICATIONS:**

The requirements listed below are representative of the knowledge, skills, abilities and minimum qualifications necessary to perform the essential functions of the position. Reasonable accommodations may be made to enable individuals with disabilities to perform the job.

- High School Diploma, GED, or relevant work experience.
- Must have experience using a computer extensively.
- Excellent customer service skills.
- Ability to communicate effectively, both written and verbally.
- General knowledge of household budgeting and daily money management.
- Accuracy in maintaining financial records.
- Bi-lingual is preferred but not necessary to the position.
- Ability to work cooperatively with a wide variety of individuals including people with significant physical and mental impairments and varying socioeconomic backgrounds.
- Must have the ability to manage multiple clients/accounts simultaneously and respond to immediate requests for specific program information.

## **WORK ENVIRONMENT AND PHYSICAL DEMANDS:**

The physical demand and work environment characteristics described here are representative of those an employee encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; walk; sit; use hands to finger, handle or feel; reach with hands and arms; and talk or hear. The employee is occasionally required to bend, kneel and crouch. Specific vision abilities required by this job include close vision and distance vision. The noise level in the work environment is usually moderate. The employee must occasionally lift, and/or carry/move objects up to 50 pounds.

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, smart phones, photocopiers/scanners, shredders and filing cabinets.

## **SPECIAL REQUIREMENTS:**

- Must pass a criminal history background investigation; however a conviction of a crime may not necessarily disqualify an individual from this position.
- CAPECO is a drug free workplace and pre-employment screening will be required.
- Possession of or ability to obtain a valid Oregon Driver's License and insurable driving record is required.

THE ABOVE JOB DESCRIPTION has been discussed with me, and I accept all responsibilities and can perform all duties with or without reasonable accommodations as outlined above.

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EMPLOYEE'S SIGNATURE

\_\_\_\_\_  
DATE