



ORANGE COUNTY UNITED WAY JOB DESCRIPTION

Job Title: Financial Case Manager	Reporting To: Program Manager, SparkPoint OC
Department: United for Financial Security	Position: Full-time/Exempt

Through SparkPoint OC, the United for Financial Security initiative supports Households experiencing financial hardship or housing instability. This program helps households address immediate challenges and sets them on the path toward financial stability so they can go from surviving to thriving.

Overall purpose of role:

Orange County United Way seeks an experienced, bilingual (English and Spanish) Financial Case Manager to provide financial coaching and case management for South Orange County residents. In a fast-paced work environment that revolves around client support via in person meetings and phone calls, the financial case manager will conduct outreach, meet participant enrollment goals, facilitate 1:1 financial coaching and case management, and work towards successful completion of the program for all participants.

Key Duties and Responsibilities:

Under the direction of the Program Manager, the Financial Case Manager's responsibilities include, but are not limited to:

- Be the main point of contact for aspects of program administration and communication with participants and partnered agencies.
- Conduct orientations and outreach events to recruit participants to meet program enrollment goals.
- Manage referral and enrollment processes to ensure timely response and appropriate tracking of services.
- Coordinate and track services and outcomes to comply with funder established reporting requirements.
- Individual financial coaching:
 - Develop individualized action plans for families that address financial, education, housing, employment and other service needs
 - Utilize designated evaluation tools and program databases, survey each participant, and provide them with a household overview of their financial wellness at the beginning, middle and end of the program
 - Assist participants in developing financial, educational and housing goals and work with them to develop a plan to achieve those goals
 - Review credit reports with participants and provide guidance on repairing credit and/or improving their credit score
 - Establish effective relationships with participating individuals and families and make appropriate referrals to other agencies to assist, support and reinforce the achievement of program goals
- Participate as a team member in assigned project activities and perform other tasks as assigned related to United for Financial Security or the organization as a whole.



Desired qualifications and skillsets:

The ideal candidate must be passionate about educating the community and possess a knowledge of personal finances, public assistance benefits and other community resources to support families.

- Must be fluent, bilingual in English and Spanish (reading, writing and speaking)
- Experience providing Case Management preferred
- Excellent communication skills
- Self-motivated and able to work effectively with minimal supervision
- Ability to represent the program and Orange County United Way with public and private partners
- Interpersonal communication, empowering, strategic thinking, and problem-solving skills.
- Team player who is inclusive, flexible, creative and energetic
- Knowledge of issues affecting low to moderate-income households and communities
- Ability to promote the use of coaching and cultural sensitivity in engaging participants
- Computer proficiency in Microsoft Office (Word, Excel and PowerPoint) and Zoom
- Bachelor's degree in Social Work, Public Administration, or related fields preferred or 2 years of related experience
- Access to a car, California Driver's License, car insurance and satisfactory driving record are conditions of initial and continued employment

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. 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 be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 10 pounds.

Compensation

- Commensurate with experience, education, and market – \$66,560 to 70,000; competitive benefits.

Send Cover Letter and Resume To:

recruiting@unitedwayoc.org

Orange County United Way
18012 Mitchell South, Irvine, CA 92614

<https://www.unitedwayoc.org/>