



**ORANGE COUNTY UNITED WAY
JOB DESCRIPTION**

JOB TITLE: FINANCIAL CASE MANAGER, SPARKPOINT OC	REPORTING TO: PROGRAM MANAGER
DEPARTMENT: UNITED FOR FINANCIAL SECURITY	POSITION: FULL-TIME / NON-EXEMPT

Purpose of Position

Orange County United Way is seeking a dedicated and bilingual (English/Spanish) Financial Case Manager, SparkPoint OC to provide personalized financial coaching and case management services to South Orange County residents. This role is essential in helping individuals and families achieve financial stability through goal setting, resource navigation, and ongoing support. Operating in a fast-paced, client-centered environment, the Financial Case Manager will lead outreach efforts, meet enrollment targets, and guide participants through successful program completion.

This position is grant funded through December 31, 2027.

Key Duties and Responsibilities

Program Administration & Client Engagement

- Serve as the primary point of contact for program participants and partner agencies.
- Conduct orientations and outreach events to recruit and enroll participants, meeting established program goals.
- Manage referral and intake processes, ensuring timely follow-up and accurate documentation.
- Track services and outcomes in alignment with funder reporting requirements.

Financial Coaching & Case Management

- Provide one-on-one financial coaching tailored to each participant's needs.
- Develop individualized action plans addressing financial, educational, housing, and employment goals.
- Utilize program databases and evaluation tools to assess participant progress and generate financial wellness "snapshots" at key intervals.
- Review credit reports with participants and offer guidance on credit repair and improvement strategies.
- Build strong, trust-based relationships with participants and connect them to appropriate community resources to support goal achievement.

Program Support & Collaboration

- Support SparkPoint OC's Volunteer Income Tax Assistance (VITA) site during tax season, including passing the IRS Tax Law Certification (training provided).
- Collaborate with internal teams and external partners to enhance service delivery and participant outcomes.
- Participate in team meetings, trainings, and organizational initiatives as assigned.



Job Requirements /Technical Knowledge

Language Skills: Fluent in English and Spanish (spoken, written, and reading).

Education: Bachelor's degree preferred; minimum of 2 years of relevant experience in financial coaching, case management, or social services.

Experience:

- Experience working with low- to moderate-income households and diverse communities.
- Familiarity with culturally responsive coaching practices.
- Prior case management experience strongly preferred.

Technical Skills:

- Proficiency in Microsoft Office (Word, Excel, PowerPoint) and Zoom.
- Experience with database platforms for tracking and reporting.
- Ability to pass IRS Tax Law Certification during tax season (training provided).

Other Requirements:

- Strong interpersonal and communication skills.
- High level of professionalism, discretion, and organizational ability.
- Access to reliable transportation.

Compensation

- Commensurate with experience, education, and market, \$30-\$33 per hour. Competitive benefits.

Core Competencies

- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **Interpersonal Skills** - Maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly and persuasively in positive or negative situations; listens and obtains clarification; responds well to questions; participates in meetings.
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.
- **Teamwork** - Exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests.
- **Professionalism** - Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration, regardless of status or position; accepts responsibility for own actions; follows through on commitments.
- **Language Skills** - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

Company Standards

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while



understanding the necessity for communicating and coordinating work efforts with other employees and organizations. Willing to embrace change and new technologies. Commitment to the values and mission of Orange County United Way.

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 25 pounds.

Send Cover Letter and Resume To:

recruiting@unitedwayoc.org

Orange County United Way

18012 Mitchell South, Irvine, CA 92614

www.unitedwayoc.org