



ORANGE COUNTY UNITED WAY JOB DESCRIPTION

Job Title: SparkPoint OC Case Manager	Reporting To: Program Manager, Financial Wellness
Department: United for Financial Security	Position: One-year grant funded Full-time/non-exempt 37.5 hours per week

*Recruitment Closing Date: September 15, 2021

United for Financial Security provides fidelity to those in Orange County struggling to get by. We are creating meaningful relationships with those in need and linking them to a network of resources from the nonprofit, public, and business sectors to provide families with services that assist them in meeting their goals. Our three-tiered strategy provides financial security through: one-on-one financial coaching, connecting qualified candidates to training, support and better paying jobs and protection against hardships and adversity by providing a safety net of resources. We are looking for a passionate Case Manager that has a strong commitment to helping those in need ***to start immediately.***

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

This job is ideal for someone who is:

Are you a recent college graduate or a seasoned case manager?

Passionate - are you passionate and dedicated to helping individuals achieve financial well-being?

Dependable – do you always follow through on getting the job done?

Adaptable/flexible - do you enjoy work that requires frequent shifts in direction?

Detail-oriented - are you able to focus on the fine details?

Orange County United Way seeks an experienced, bilingual (English and Spanish) Case Manager for SparkPoint OC to provide financial coaching and case management for individuals residing in South Orange County. In a fast-paced work environment that revolves around client support meetings and phone calls, the Case Manager will facilitate 1:1 financial coaching and case management, present financial literacy workshops, and work towards the successful completion of the program for all participants.



Key Duties and Responsibilities

SparkPoint Case Manager's responsibilities include, but are not limited to:

- Point person for all aspects of program administration and communication with participants via video and in-person meetings and phone calls.
- Develop comprehensive, individualized action plans for families that address financial, education, housing, employment and other service needs, with goal to serve 50 families.
- Utilize designated evaluation tools to survey each participant and provide them with a household "snapshot" of their financial wellness throughout their participation in the program.
- Track services and outcomes to conform with funder-established reporting requirements.
- Review credit reports with participants and provide guidance on repairing credit and/or improving credit score.
- Provide participants with the suite of services and trainings remote or in-person as needed to support participant goals.
- Provide quality customer service to all participants including, but not limited to, answering questions, addressing concerns and assisting with basic needs.
- 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.

Required Skills and Experience

- Must be bilingual in English/Spanish (reading, writing and speaking).
- Knowledge of issues affecting low- to moderate-income households and communities.
- Experience providing case management and financial literacy education – Financial Social Work certification preferred, but not required.
- Strong interpersonal communication, empowering, strategic thinking, and problem solving skills.
- Strong presentation skills; the ability to interact with an audience and transmit our message.
- Proven experience managing multiple scopes of work to meet deadlines.
- Ability to work independently and autonomously.
- High level of attention to detail.
- Bachelor's degree in Social Work, Public Administration, or related fields or equivalent experience.

Technical Knowledge

- Computer proficiency in Microsoft Office (Word, Excel, PowerPoint and Outlook); Zoom
- Ability to learn and adapt to new tools
- Client, project, time, and database management



Physical Demands

Physical demands are representative of the requirements necessary for an employee to successfully perform the essential functions of this position. The employee is required to actively listen and communicate clearly. The employee is required to stand and publicly speak. The employee is required to walk, reach with arms and hands, climb, balance, twist, lean, move from one location to another, and to stoop, kneel, crouch or crawl. Vision abilities required by this job include close and far. Ability to operate a computer keyboard and mouse, and lift files and reports is required. Employee must be able to lift and carry 25 pounds.

The employee is required to talk and hear. The employee is often required to sit and use their hands and fingers to handle or feel. The employee is required to stand, walk, reach with arms and hands, climb, balance, twist, lean, move from one location to another and to stoop, kneel, crouch or crawl. Vision abilities required by this job include close vision. **Reliable transportation and a clean driving record are required as the employee may need to travel throughout Orange County to meet with participants and for other work engagements.** Participation in early morning and evening meetings as well as weekend events will be required. The noise level in the work environment is usually quiet to moderate.

Send Cover Letter and Resume To:

recruiting@unitedwayoc.org
Orange County United Way
18012 Mitchell South, Irvine, CA 92614
www.unitedwayoc.org
No phone calls, please!