



**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

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 services that meet the families' goals. Our three-tiered strategy provides *Financial Wellness* 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.

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, present financial literacy workshops, 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 person for aspects of program administration and communication with participants
- Conduct orientations and outreach events to recruit participants and 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 conform 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 "snapshot" 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

Desired qualifications and skillsets:

The ideal candidate is extremely passionate about educating community residents and possesses a strong knowledge or personal finance, public assistance benefits and other community resources to support families to go from surviving to thriving.

- Must be fluent, bilingual in English and Spanish (reading, writing and speaking)
- Experience providing case management
- 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
- A doer and 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

Compensation

Commensurate with experience, education, and market \$64,480 – \$70,000 per year. Competitive benefits.

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. Ability to operate a computer keyboard and mouse. Remain in a stationary position, often standing or sitting for prolonged periods of time.

Send Cover Letter and Resume To:

recruiting@unitedwayoc.org
Orange County United Way
18012 Mitchell South, Irvine, CA 92614
www.unitedwayoc.org