



**ORANGE COUNTY UNITED WAY  
JOB DESCRIPTION**

<b>Job Title:</b> Information & Referral Specialist	<b>Reporting To:</b> Client Services Manager
<b>Department:</b> Contact Center, 2-1-1 Orange County	<b>Position:</b> Full-time/NON-EXEMPT

**Purpose of Position**

The primary purpose of the Information & Referral Specialist at our Contact/Call Center is to assess each caller's needs and accurately refer them to the appropriate health, human and/or social services agencies from the 2-1-1 Orange County (211OC) resource database. We achieve this by educating expert working knowledge of the 211OC resource database and its management software, advocating, and empowering each caller so that they are provided with great customer service. By the end of each call, clients are one step closer to receiving the assistance that they need.

**Key Duties and Responsibilities**

- Provide information and referral services to clients contacting 211OC through the helpline, email, texting methods, outreach events, or any other means identified by 211OC management as official I&R channels.
- Perform in-depth screenings and assessments, collects client information, and encourage clients to apply for entitled benefits.
- Connect clients to appropriate resources, empower clients, de-escalate upset clients during crises and/or situations of abuse, trouble-shoot for additional options.
- Educate clients on available services to ensure it best fits their need and empower clients to choose the services they feel are most appropriate for their situations.
- Follow-up with clients in critical situations to ensure they received the assistance that they needed. If not, provide them with additional resources and help.
- Provide warm-transfers to appropriate crisis response teams in critical situations to receive help including Domestic Violence, Suicide, and Behavioral health hotlines, fire, and police departments.
- Assist callers with different languages by using the Language Line.
- Develop an expert working knowledge of the 211OC's management software including Community Information Exchange database, telephony, softphone, texting, administrative systems and other approved software.
- Troubleshoot unavailability of services through expert knowledge of navigation of the 211OC's resource database and through teamwork with other I&R Specialists and the Resource Department.
- Assist clients in problem-solving when no services are available which can meet their needs.
- Other duties as assigned.
- Assist with compiling monthly and bi-annual program reporting.
- Advocate on behalf of clients who have been denied services.
- Troubleshoot basic technological failures.
- Performs other duties as assigned.

**Core Competencies**

- Active listening and assessment skills
- Excellent customer service skills



- Computer competency with basic ability to troubleshoot technological failures
- Independent decision making skills utilizing processes, systems and resources
- Professional communication skills (verbal and written)
- Possess skills in proper telephone etiquette
- Ability to maintain a calm and sensitive demeanor
- Ability to be part of a team, working internally and externally.

### **Job Requirements /Technical Knowledge**

- High School Diploma or BA/BS Degree in the Human Service Field
- Prior experience providing information and referral services or related experience in the human service field is desirable.
- Must be Bilingual (English and Spanish– verbal and written)
- One year of experience working directly with individuals and families in crisis from the community

### **Compensation**

- \$20.50 per hour. 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 publically 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.

### **Send Resumes To:**

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