



**ORANGE COUNTY UNITED WAY  
JOB DESCRIPTION**

<b>JOB TITLE:</b> INFORMATION AND REFERRAL SPECIALIST	<b>REPORTING TO:</b> MANAGER, CONTACT CENTER
<b>DEPARTMENT:</b> 211 OC	<b>POSITION:</b> FULL-TIME / EXEMPT

**Purpose of Position**

Orange County United Way's 2-1-1 Orange County (211OC) serves as the county's comprehensive information and referral system, connecting residents to health, human, and social services 24/7. As a frontline member of the Contact Center team, the Information & Referral Specialist provides empathetic, client-centered support to individuals and families seeking assistance. This role is responsible for assessing needs, navigating resources, and empowering callers to access services that promote stability and well-being.

The ideal candidate is bilingual (English/Spanish), compassionate, detail-oriented, and thrives in a fast-paced, high-volume call center environment. They are skilled communicators who remain calm under pressure and are committed to delivering exceptional service to the community.

**Key Duties and Responsibilities**

- **Client Engagement & Support**
  - Respond to inquiries via helpline, email, text, and outreach events, providing accurate information and referrals.
  - Conduct thorough screenings and assessments to identify client needs and eligibility for services.
  - Educate clients on available resources and empower them to make informed decisions.
  - De-escalate distressed callers and intervene in crisis situations, including abuse, domestic violence, and mental health emergencies.
  - Provide warm transfers to appropriate crisis response teams and emergency services.
- **Resource Navigation & Advocacy**
  - Develop expert-level knowledge of the 211OC resource database and management software.
  - Troubleshoot service gaps and collaborate with team members to identify alternative solutions.
  - Advocate on behalf of clients who face barriers or have been denied services.
  - Assist clients in problem-solving when no immediate services are available to meet their needs.
- **Follow-Up & Impact Tracking**
  - Conduct follow-ups with clients in critical situations to ensure they received needed assistance.
  - Provide additional support and referrals when initial services are insufficient.
  - Accurately document client interactions and service outcomes in the database.



- Assist with compiling monthly and bi-annual program reports.
- **Technology & Systems Use**
  - Utilize telephony, softphone, texting platforms, and administrative systems to manage client interactions.
  - Troubleshoot basic technical issues and support system functionality.
  - Use Language Line services to assist callers who speak languages other than English or Spanish.
- **General Duties**
  - Participate in outreach events and represent 211OC in the community.
  - Maintain confidentiality and adhere to organizational policies and procedures.
  - Perform other duties as assigned to support the success of the department and organization.

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

- High School Diploma required; BA/BS in Human Services or related field preferred.
- Minimum 1 year of experience working directly with individuals and families in crisis.
- Prior experience in information and referral services or human services preferred.
- Must be bilingual in English and Spanish (verbal and written).
- Strong communication and interpersonal skills.
- Ability to remain calm and professional in high-pressure situations.
- Excellent organizational skills and attention to detail.
- Proficiency in Microsoft Office and database systems.
- Commitment to equity, empathy, and client-centered service.

### **Compensation**

- Commensurate with experience, education, and market, \$21-\$23 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](mailto:recruiting@unitedwayoc.org)

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

[www.unitedwayoc.org](http://www.unitedwayoc.org)