



**ORANGE COUNTY UNITED WAY
JOB DESCRIPTION**

JOB TITLE: LEAD INFORMATION AND REFERRAL SPECIALIST, FRC	REPORTING TO: SENIOR MANAGER, COMMUNITY PROGRAMS
DEPARTMENT: 211 OC	POSITION: FULL-TIME / NON-EXEMPT

Purpose of Position

Under the supervision of the Senior Manager, Community Programs, the Lead Information & Referral (I&R) Specialist serves as the primary point of contact for individuals and families seeking community resources at the El Modena Family Resource Center. This role is responsible for conducting comprehensive intakes and needs assessments, providing accurate referrals, and ensuring high-quality service delivery in alignment with the standards set by the Alliance of Information and Referral Systems (AIRS).

The Lead I&R Specialist also supports data integrity, staff onboarding, and quality assurance processes, while maintaining expert-level knowledge of the 2-1-1 OC database and related systems. This position plays a critical role in empowering clients, coordinating with internal teams, and ensuring access to essential health and human services.

Key Duties and Responsibilities

- **Client Services & Resource Navigation**
 - Provide direct support to walk-in, call-in, and referred clients seeking community resources.
 - Conduct thorough needs assessments and connect clients to appropriate services using the 2-1-1 OC resource database.
 - Empower clients to make informed decisions about available services and support options.
 - De-escalate distressed clients and intervene in crisis situations, including abuse or urgent housing needs.
 - Maintain accurate daily referral logs using FaCT Intake Sheets and enter data into VistaShare.
- **Leadership & Quality Assurance**
 - Assist the Senior Manager with onboarding and training of in-person I&R Specialists.
 - Conduct quality assurance reviews of VistaShare entries to ensure data accuracy and completeness.
 - Provide guidance and support to I&R team members, promoting collaboration and consistency in service delivery.
 - Troubleshoot service gaps and support team problem-solving using expert knowledge of the 2-1-1 OC database.
- **Program Coordination & Administrative Support**
 - Collaborate with on-site staff to follow up on referrals and ensure clients successfully



access services.

- Administer FaCT-approved measurement tools and input results into the FaCT database.
- Assist with creating FRC calendars, flyers, and maintaining the front desk/lobby area.
- Contribute to seasonal programs such as Toy Distribution, VITA (Tax Pre-Screening), and other community initiatives.

- **System & Technology Use**

- Develop expert-level knowledge of the 2-1-1 OC Community Information Exchange and Amazon Software System.
- Contact agencies to update resource information and maintain database accuracy.
- Troubleshoot basic technical issues and support system functionality.

- **General Duties**

- Support teammates in I&R provision when assistance is requested.
- Advocate on behalf of clients who face barriers or have been denied services.
- Perform other duties as assigned to support the success of the El Modena FRC and 211OC initiative.

Job Requirements /Technical Knowledge

- High School Diploma required; BA/BS in Human Services or related field preferred.
- Bilingual proficiency in English and Spanish required.
- Prior experience in information and referral services or related human services work strongly preferred.
- Strong interpersonal, communication, and crisis intervention skills.
- Proficiency in data entry and database navigation.
- Ability to work independently and collaboratively in a fast-paced environment.

Compensation

- Commensurate with experience, education, and market, \$22-25 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

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