

## Okanogan County Community Action Council

### Recruitment Announcement for Financial Assistance Services Case Manager

**OCCAC Mission:** Leading a revolt on poverty through education, empowerment, and engagement.

**OCCAC Values:** Integrity. Accountability. Advocacy. Community.

Okanogan County Community Action Council is seeking an initiative-taking Case Manager to assist residents that fall twenty-five percent below the poverty level. Tax credits are widely recognized as one of the nation's most powerful resources for lifting individuals and families out of poverty. Tax credits provide a refundable cashback credit to low-income working individuals and families when they prepare and file their annual income tax returns.

OCCAC is a contractor with the State of Washington to assist eligible clients in filing their taxes and taking advantage of the Working Family Tax Credit. The Financial Assistance Services Case Manager will offer services that connect low-income with free tax filing assistance while adhering to grant requirements and guidelines from the Washington State Department of Commerce. The Case Manager will be responsible for working with individuals and families from diverse backgrounds and coming from rural communities.

The Case Manager will identify community partners that offer financial literacy courses, continue outreach to diverse members of the community, ensure materials are culturally and linguistically relevant for Okanogan County demographic, and ensure interested clients understand the qualifying factors for eligibility.

**Salary Range:** \$17.00 – \$32.72 per hour DOE with a starting range \$23.00 - \$26.00 per hour (DOE) with medical, dental, vision, Simple IRA. Non-Exempt

**Deadline for Application:** December 1, 2023, for first review. Position open until filled. Email cover letter, resume, and three professional references to [HR@occac.com](mailto:HR@occac.com) and/or call 509.422.4041 or 509.283.1046 with questions.

For a complete Job Description, go to [www.occac.com/about-us/employment/](http://www.occac.com/about-us/employment/)

#### **About Okanogan County:**

Okanogan County is for the adventurous. Seventy percent of the land is state and federal forest with limitless recreation opportunities for fishing, hunting, hiking, biking, horseback riding, and more. You will find wide-open spaces teeming with wildlife, spectacular scenery from the Columbia River to the mountain peaks of the North Cascades, and family fun for all.

**To learn more, go to [www.okanogancounty.com](http://www.okanogancounty.com) and [www.okanogancounty.org](http://www.okanogancounty.org)**

Position title	Department	Reports to
Financial Assistance Services Case Manager	Support Services	Support Services Manager
Employment status	FLSA status	Effective date
<input type="checkbox"/> Temporary <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time 40 hrs/wk	<input checked="" type="checkbox"/> Nonexempt <input type="checkbox"/> Exempt	Nov 15, 2023

## Position Summary

The Financial Assistance Services Case Manager will offer intensive, wraparound case management for financial assistance services to support low-income individuals, youth, veterans, and families in Okanogan County to become more financially stable. The two major programs that will be offered through case management are Washington’s Working Family Tax Credit (WFTC) and Financial Literacy.

The Financial Assistance Services Case Manager will identify community partners that offer financial literacy courses, continue outreach to diverse members of the community, ensure materials are culturally and linguistically relevant for Okanogan County demographic, and ensure interested clients understand the qualifying factors for eligibility.

## Essential Duties and Responsibilities

The essential functions include, but are not limited to the following:

- Implement OCCAC’s services to support clients in taking advantage of the WFTC.
- Support client access to kiosk services to determine eligibility for WFTC, EITC and ITIN applications.
- Research and find free-tax filing systems that will serve as a resource to clients.
- Develop referring relationships with community partners.
- Work with OCCAC’s Communications and Outreach specialist to create a plan for communications and outreach to partner with other community social services agencies and promote the new WFTC services.
- Present information on OCCAC’s Financial Assistance Services at various community and civic meetings.
- Coordinate with community partners to display print media in their locations.
- Ensure Financial Literacy courses meet expectations for clients’ outcomes.
- Establish systems with OCCAC case managers for internal referrals that will connect clients to financial assistance services.
- Complete any required training and attend all meetings as required to administer these services.
- Ensure clients have equal access to services and that services are delivered in a professional, ethical, and beneficial manner.
- Ensure that all aspects of OCCAC’s new Financial Assistance Services adhere to and advance the Mission and Values of OCCAC.
- Ensure all programs align with standards, compliance, and guidelines.
- Ensure accuracy & quality of all program and fiscal reporting as well as file management.

- Updates job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations.
- May require regional travel.
- Other duties as assigned.

## **Desirable Qualifications (Knowledge, Skills, and Abilities)**

- Bilingual English/Spanish required.
- Ability to work on a team.
- Customer service experience.
- Ability to prioritize and effectively delegate.
- Success in development and implementation of innovative programs.
- Strong human resource skills.
- Strong communication (verbal, written, and presentations).
- Outstanding organizational skills
- Proficient in Microsoft Office Suite and free filing systems like e-filing (IRS) or Turbo Tax.
- Associates or Undergraduate degree in related field or equivalent experience preferred.
- Minimum of three years' experience in
  - Working with and administering Financial Services.
  - Assisting individuals and families with diverse backgrounds, abilities, and challenges.
- Project management experience with both analysis of information and implementation of projects.
- Ability to perform daily duties to achieve expected outcomes and performance measures with minimal supervision.
- Display professional appearance.
- Ability to manage difficult situations in a discreet and professional manner.
- Willingness & ability to travel on agency business to various sites daily if needed, vehicle provided.
- Ability to obtain FBI Act 73, criminal history, Act 33, and Act 34 clearances.
- Valid Washington Auto Insurance coverage.
- Valid Washington State driver's license with acceptable driving record.

## **Physical Demands and Work Environment**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodation may be made to enable individuals with disabilities to perform the functions.

While performing the duties of this job, the employee is constantly required to sit, talk, see, and hear. The employee is constantly required to stand, walk, or use hands to finger, handle, or feel objects, standard keyboards and office equipment or controls and reach with hands and arms. The employee will occasionally need to lift and/or

move objects up to 20 pounds and seldom lift and/or move objects up to 20 pounds above their head. Noises in the work environment are usually moderate.

## **Note**

This job description in no way states or implies that these are the only duties to be performed by the employee(s) of this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities.

To perform this job successfully, the employee(s) will possess the skills, aptitudes, and abilities to perform each duty proficiently. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an at-will relationship.

The company is an equal opportunity employer, drug-free workplace, and complies with ADA regulations as applicable.