ORGANIZATIONAL OVERVIEW
United Way of the Mid-South is a multi-million-dollar non-profit public charitable foundation that mobilizes financial and human resources across 8-counties to meet critical needs and to help ensure that hundreds of thousands of Mid-Southerners can achieve their highest potential. We support high-performing non-profit agencies that are on the front lines fighting to decrease poverty in our community by addressing the essential building blocks for success – education, financial stability, and health – while maintaining vital safety net services in food, shelter, and safety for individuals facing crisis situations. By joining United Way of the Mid-South, you are uniting with a team who is moving the needle on poverty and making our community a place where everyone can thrive.

POSITION OVERVIEW
The Referral Associate will respond to referrals initiated through the Driving The Dream network of partners. This includes coordinating referral appointments, sending reminders, and maintaining and updating client files. Additionally, the referral coordinator must maintain confidentiality and be comfortable managing multiple projects while maintaining integrity at the core of the initiative. The Referral Associate will also assist the care coordinator by coordinating services for enrolled clients and proactively following up on the clients referred to the program. The Referral Associate will support the efforts of the Free Tax Preparation / VITA (Volunteer Income Tax Assistance) tax site by providing stellar customer service to all who enter the tax site. The Referral Associate will conduct surveys and support taxpayers waiting for a tax preparer to complete their taxes.

PRIMARY DUTIES AND RESPONSIBILITIES
• Welcome the taxpayers to the Free Tax Prep site.
Assistant, Referral Associate

- Efficiently coordinates and follows up on referrals.
- Regularly check mail, e-mail, and voicemail and respond promptly and professionally to all inquiries.
- Communicate information regarding referrals using a shared database.
- Enter and update all referrals into the shared data system and track and record referral information as it is received.
- Effectively communicate with the care coordinator, client, and service providers to properly coordinate services and ensure completion of services.
- Complete follow-up activities for incomplete referrals and respond appropriately (i.e., contact clients, make appointments, contact receiving agencies, and update care plans).
- Maintain accurate and timely data for tracking, reporting, and conducting follow-ups on activities.
- Familiarize and utilize a directory of referral resources to meet the basic needs of referred and enrolled clients.
- Participate in all meetings, training, and professional development opportunities.
- Serve as a point of information and resource for clients, fellow staff members, and service providers.
- Assist in identifying and screening clients for appropriate resources to meet the needs of clients.
- Assist the care coordinator with identifying goals and developing care plans.
- As a member of the team, perform other duties as assigned.
- Successful completion of the Volunteer Standards of Conduct, Intake/Interview/Quality Review certifications.
- Assist taxpayers with documentation and paperwork necessary for a successful interview with the tax preparer.
- Assist taxpayers in the completion of customer satisfaction surveys and interviews.
- Comfort and experience working with computers and web-based reporting programs.
- Assist with marketing and publicity for all UWMS tax sites.
- Perform other work as assigned.
- Work appropriately and enthusiastically with others and respond appropriately in interpersonal situations.

Qualifications
- Pursuing a degree in social services or a related field.
Assistant, Referral Associate

- Successful completion of the IRS required certification exams, Volunteer Standards of Conduct, and Intake/Interview/Quality Review.
- Have the ability to work well in a fast-paced environment and display a supportive and professional disposition with diverse populations.
- Strong interpersonal communication skills.
- Must adhere to the privacy and confidentiality of taxpayer information.
- Experience and comfort serving clients from diverse backgrounds.
- Comfort with technology (computers, software, internet platforms, etc.).
- Strong ability to work independently without supervision and collaboratively with a team.
- Proven experience in community relations and ability to work with the public in diverse settings.
- Excellent customer service and public relations skills.
- Self-motivated with a high degree of flexibility, creativity, and independence.
- Flexible schedule (some assignments will require weekend/evening work).
- Bilingual in English and Spanish preferred, not required.

**Physical Requirements**

While performing the duties of this job, the employee is regularly required to sit, talk and/or hear. The employee is frequently required to use finger and hand motion and occasionally to stand, walk and reach with hands and arms. Physical requirements include climbing stairs and carrying, lifting, and setting up equipment and furniture weighing up to 25 lbs. Specific vision abilities required by this job include close vision, distance vision, depth perception, and the ability to adjust focus.

**Working Conditions**

United Way of the Mid-South is an equal opportunity employer and does not discriminate against any person because of race, color, creed, religion, sex, national origin, disability, age, genetic information, or any other characteristic protected by law. This nondiscrimination policy extends to all terms, conditions, and privileges of employment, as well as the use of all company facilities, participation in all company-sponsored activities, and all employment actions. United Way of the Mid-South will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship.

Flexible hours are required as job duties demand. Must have a valid Driver's License, car insurance, and reliable transportation. Must have a personal cell phone to
communicate outside of the office. The position also requires flexible hours outside regular business hours and local travel to meet with partners.

**OTHER DUTIES**

Please note that this job description is not designed to cover or contain a comprehensive listing of the employee's activities, duties, or responsibilities required for this position. Other duties, responsibilities, and activities may be assigned at any time, with or without notice. Occasional travel may be required to complete this position's requirements.

**UNITED WAY CORE COMPETENCIES**

- **Mission-Focused:** Catalyze others' commitment to the mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** Steward of the brand and understands their role in growing and protecting the reputation and results of the greater network.

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