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 Coordinator will also assist the care coordinator by coordinating services for enrolled clients and proactively following up on the clients referred to the program.

PRIMARY DUTIES AND RESPONSIBILITIES

- 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.
Assistant, Referral Associate

- 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 the purpose of 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.
- Prepare, review, and submit reports within the required time frames.
- Assist in the management of care coordination clients.
- Assist in identifying and screening clients for appropriate resources to meet the needs of clients (housing, employment, etc.).
- Assist the care coordinator with identifying goals and developing care plans.
- As a member of the team, perform other duties as assigned.

Qualifications

- Graduation from an accredited college or university with a Bachelor’s degree in a human service-related field.
- At least two (2) years of experience in social work, care coordination, case management, human services, or a non-profit environment.
- Experience working with varying populations and a high level of cultural competency.
- Must be fluent and flexible with technology (i.e., strong computer skills, particularly with spreadsheets, databases, and remote access).
- Familiarity and a broad understanding of the local services and the ability to connect clients to these services to meet their needs.
- Have an ability to work effectively in an outcomes-based environment with competing priorities.
- Ability to effectively interface with a wide range of partner community agencies.
- Maintain confidentiality and objectivity when dealing with sensitive client issues.
- A demonstrated commitment to the field and a passion for serving under-served and under-resourced individuals, families, and/or communities, particularly people living in poverty.
- Desire to serve as an integral leader at an established community institution in the midst of a unique period of change and transition.
Assistant, Referral Associate

- Not just tolerance for, but the enjoyment of, working with a degree of ambiguity during this entrepreneurial period of transformation and the ability to help others successfully move through this change.
- Quick learner, possessing superior judgment.
- Working knowledge of results-based accountability frameworks.
- Demonstrate strong critical thinking skills for analysis and problem-solving.
- Experience designing and implementing training on various subjects and modalities.
- Ability to work independently.
- Ability to communicate across all levels of the operation with a great degree of respect and collegiality.

Supervisory Responsibility
No direct supervisory responsibility.

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.

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.

**LEADERSHIP COMPETENCIES**

**TALENT MANAGEMENT & PEOPLE DEVELOPMENT**
- Builds and leads a diverse team that enables the organization to succeed; Hires the right people; Demands high performance and results; Ensures people’s work is aligned with the mission and strategy.
- Is open to new ideas; Invests time and resources in training, development, and succession for the department; Identifies and grooms high-potentials; Delegates effectively.
- Coaches and mentors employees and teams.
- Receives and provides feedback in a constructive way that builds confidence among staff; Addresses performance problems.

**BUSINESS ACUMEN & STRATEGIC DIRECTION**
- Demonstrates understanding and knowledge of the United Way network; Understands the business of the organization; and effectively creates strategy.
- Understands the community and its business environment.
- Understands general business and financial principles required to effectively lead, manage and align resources for performance; Is able to read financial statements and create budgets.
- Contributes to the bottom line by helping the organization grow its resources and capacity.

**OPERATIONAL PLANNING & EXECUTION**
- Establishes effective and efficient processes that align the department priorities with organization goals, strategy, and mission.
- Collaborates effectively within the organization.
- Inspires and motivates people to build the culture of United Way as the Mission of Choice.
- Engages volunteers in a way that helps execute the strategy.

**OUTWARD TURNING**
Assistant, Referral Associate

- Develops strategic relationships to benefit United Way and the community; and, Knows key players in the community and is diligent in maintaining and expanding the network of partners.
- Seeks to learn from inside and outside the network to build skills, knowledge, and abilities to challenge the organization in reaching its potential.
- Is an effective spokesperson for United Way and its work
- Establishes credibility as a leader on critical issues and solutions affecting the community.

Technical/Functional Competencies
- Effective Communication
- Collaborator
- Ethical Practice
- Global & Cultural Awareness
- Relationship Management
- Adaptability and Change Management
- Cross-Functional Capability and Collaboration
- Deep Community Expertise
- Product Development and Implementation
- Advocacy and Public Policy
- Drive for Stakeholder Success

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.
**APPLICATION PROCESS**

Qualified applicants should send a cover letter, resume, and three references (with phone numbers) to the attention of careers@uwmidsouth.org. Please be sure to reference the position for which you are applying in the subject line of your correspondence. For more information about United Way of the Mid-South, please visit us online at www.uwmidsouth.org.

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