



Position: **Community Impact Coordinator – Smart Referral Network**
Reports to: Community Impact Director of Information, Referral and Partner Development
Type: Fulltime Time, Non Exempt, Hybrid

Background: The Smart Referral Network (SRN) Software is a solution that leverages 211 Monterey County's resource directory to support communication, closed-loop referrals, information sharing and care coordination between organizations in Monterey and other counties. The SRN is also a coalition of 55+ Monterey County nonprofits and multi-sector partners working together to increase access to needed services, improve cross agency collaboration and address the social determinants of health and economic self-sufficiency.

Summary: The Community Impact Coordinator of the Smart Referral Network will provide critical administrative and technical support to SRN Users and agency staff as part of the Community Impact team. This role will provide training, communications, outreach, partner development, plan and document meetings and support to network users. Additionally, this role will aid in the onboarding, bug reporting and testing, enhancement testing, and long-term maintenance of the SRN technology platform.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Duties include but are not limited to the following:

- Work with the United Way staff in 4 counties to create an engaging and rewarding usership experience for SRN network partners and their staff.
- Help to design, deliver, and refine user trainings
- Develop closed loop referral network policies, procedures, resource guides and tools
- Implement the transition plan to updated software version
- Support community partners with SRN onboarding, workflow development, troubleshooting and technical assistance.
- Support the development of a Financial Empowerment closed loop referral network made up of complementary asset building service providers.
- Monitor and respond to technical support requests from the SRN users.
- Communicate regularly with software developers on bugs and software requirements,
- Monitor SRN referral inboxes and communicate with network partners to encourage them to close referral loops and enroll clients in their services.
- Follow up with clients with referrals pending to support access to needed services
- Report on program results, outputs and outcomes
- Develop SRN community meeting agendas and facilitate network meetings
- Support data governance activities to ensure that the SRN platform is equity-focused and is compliant with state and national privacy laws.
- Support the development of population specific referral networks that prioritize a population of focus with bi-directional referrals, wrap around services and care coordination (youth, mental health, LGBTQ, homeless)
- Support project management tasks using Asana and Microsoft 365 to track internal and external deadlines, create templates, and coordinate with internal staff and external partners. Maintain organized files and internal records.
- Assist in various aspects of general administrative processes such as: purchasing, invoicing, expense tracking, office automation, customer service, public information, archiving of documents, prepare and send documents, solicit feedback, and incorporate edits and other areas.
- Other duties as assigned.

SKILLS, QUALIFICATIONS, & OTHER REQUIREMENTS

- Technological proficiency
 - High level of comfort with technology
 - Ability to learn and adapt quickly to new systems
 - Provide insightful feedback informing the evolution of technological implementations
 - Power-user of cloud-based productivity and project management apps, Microsoft and Asana preferred
- Soft skills
 - Organizational capacity building concepts and practices applied by public, private, and nonprofit agencies
 - Interpersonal skills and ability to build strong relationships working in an individual or team-based environment; appreciation and respect for colleagues and their various backgrounds and cultures
 - Comfortable speaking to and leading a group, willing to be trained as a facilitator and trainer
 - Ability to remain calm under pressure
 - Time management and task prioritization skills
 - Ability to manage workload independently and proactively with the flexibility to meet changing needs and demands
- Passion and enthusiasm for the mission, vision, and values of United Way Monterey County
 - Transparency
 - Responsiveness
 - Integrity
 - Inclusion
 - Collaboration

PREFERRED EDUCATION AND EXPERIENCE:

- Bachelor's Degree *or comparable years of relevant experience* in any of the following: non-profit, public health, information technology, informatics, data sharing/governance/compliance, social/health education, public policy, public administration, or related discipline
- Project management methodology education or certification is a plus.
- Experience with software as a service (SaaS) start ups and customer service
- Experience with handling HIPAA/PII/PHI
- Familiarity with resource and referral platforms, including the governance of such platforms
- Understanding of programs and grant lifecycles
- Proficiency in spoken and written Spanish
- Training, interest, or experience in Social Services, Population Health, Diversity Equity Inclusion and Belonging, Health or Community Information Exchange, and/or Cross-sector Data Sharing/Care Coordination
- Knowledge of Monterey County resources and communities
- Spanish language proficiency

FUNCTIONAL COMPETENCIES

- Strategic Community Collaborator - Engages diverse stakeholders to accurately and effectively assess community needs and with credibility, authenticity and humility strategically guides United Way to contribute to Monterey County's priorities.
- *Effective & Engaging Communicator* - Is an effective and passionate communicator, articulating the United Way message in a way that inspires others to act in service to the organization and the community.
- *Critical Thinking & Creative Problem Solving* - Able to address and manage complex issues to achieve desired results. This includes the ability to gather, interpret and use relevant data to drive strategy development, make decisions and drive for results.



- *Planning & Implementation* - Leads and takes initiative in planning and developing initiatives within impact areas to achieve results that drive collective community outcomes.
- *Embracing & Managing Change* - Champions and facilitates change to ensure long-term community sustainability. Adapts successfully to changing needs while maintaining positive relationships with all constituents, internal and external.

GENERAL UNITED WAY COMPETENCIES

- *Mission oriented* – Performance and professional motivations are driven by a commitment to creating real social change that leads to better lives and healthier communities.
- *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 United Way brand and understands his/her role in growing and protecting the reputation and results of the organization and greater network.

Compensation: Salary Grade 4. \$27.50 – \$41.25 depending on experience

Benefits: Benefits include generous paid time off and holiday policies.

To Apply: Interested applicants are encouraged to submit a cover letter and resume by email to Tina.Engquist@unitedwaymcca.org

United Way Monterey County is an Equal Opportunity Employer.