

**AREA AGENCY ON AGING FOR SOUTHWEST FLORIDA**  
**JOB DESCRIPTION**

<b>POSITION TITLE:</b> <b>INFORMATION &amp; REFERRAL (I&amp;R) MANAGER</b>		<b>DEPARTMENT: CLIENT SERVICES</b>	
<b>STATUS:</b> <b>FT</b>	<b>FLSA STATUS:</b> <b>EXEMPT</b>	<b>SUPERVISE OTHERS:</b> YES	<b>CREATED: DEC. 2017</b> <b>UPDATED: JULY 2018</b>
<b>SUPERVISOR:</b> <b>DIRECTOR OF CLIENT SERVICES</b>		<b>CLOSING DATE:</b> <b>JULY 20, 2018</b>	

**GENERAL DESCRIPTION**

This is an exempt\* management position on the staff of the Area Agency on Aging. This position shall be responsible to manage and coordinate all functions of the Elder Helpline as well provide monitoring, oversight and coordination of quality assurance measures to ensure established standards and outcomes are met. This position serves as a liaison with community agencies regarding the needs of, and resources available to, seniors and persons with disabilities. She/he is also liaison for all questions related to Information and Referral. This position requires a high degree of independent action and initiative.

**RESPONSIBILITIES**

Management:

- ▶ Participates in the selection, training and orientation of new Helpline staff
- ▶ Supervises, counsels, mentors and evaluates assigned team members, providing guidance and technical direction.
- ▶ Provides technical assistance to the Information and Referral (I&R) staff on the varied functions of their role.
- ▶ Design (and/or update) and implement training plan for all new Helpline staff
- ▶ Provide continual feedback to staff and conduct performance evaluations
- ▶ Coordinate all leave requests ensuring coverage for workload and approving employee's timesheets in a timely manner
- ▶ Completes personnel evaluations of the I&R Specialists.
- ▶ Ensures coordination and completion of the Department of Elder Affairs, legislative and general public referrals by I&R staff.
- ▶ Responsible for ensuring all staff adhere to the Agency's established policies and procedures established in the Agency's employee manual.
- ▶ Serves as backup manager to the ADRC Manager in his/her absence.

## **INFORMATION & REFERRAL MANAGER (CONTINUED)**

### Planning and Organization:

- ▶ Plan and prioritize work flow of unit to minimize client wait time and to provide efficient, timely and friendly service
- ▶ Supervises the coordination of the workflow and the referral process between the Information & Referral staff, working with management to ensure cohesion of all related Helpline functions.

### Customer Focus:

- ▶ Understands basic issues related to different populations, including older adults, persons with physical disabilities, persons with intellectual/developmental disabilities and persons with Alzheimer's disease or cognitive impairment
- ▶ Ensures that I&R staff promote awareness of the various options that are available in the community, especially among underserved, hard-to-reach, and private paying populations; as well as options individuals can use to plan ahead for their long-term needs.
- ▶ Conducts information and referral assistance activities designed to link people with the services they need; receives telephone calls and visitors; assesses need and makes referrals, provides direct assistance and advocacy for clients as needed.

### Quality and Continual Improvement:

- ▶ Conducts quality assurance activities to include live call monitoring and case review of documentation in REFER for accuracy and adherence to protocols.
- ▶ Assists in the development of the Area Plan and completion of six month deliverables as appropriate.
- ▶ Assist Director of Client Services with practices to improve efficiency.
- ▶ Develops, maintains and implements the Helpline's Quality Assurance Plan.
- ▶ Reviews information, referral and follow-up correspondence of the I&R Specialists to ensure a thorough and appropriate response.
- ▶ Reviews reports of the I&R staff and provides feedback on content and appropriateness of referrals and documentation.

### Technical and Functional Effectiveness:

- ▶ Develops knowledge of eligibility process and requirements for government funded programs offered in the state/local area such as Medicare, Medicaid, Older Americans Act, Veterans services, state funded aging and disability programs
- ▶ Responsible for ensuring compliance with program requirements and regulations and complying with all data security and confidentiality regulations including HIPAA.
- ▶ Complete assigned duties as stated in the Agency's Comprehensive Emergency Management plan and Continuity of Operations Plan; may be responsible for providing support, input and updates.

**INFORMATION & REFERRAL MANAGER  
(CONTINUED)**

- ▶ Assist Director of Client Services with practices to improve efficiency.
- ▶ Prepares, reviews and analyzes reports generated through REFER for departmental planning purposes as well as monthly submission to Department of Elder Affairs.
- ▶ Ensures program functions operate properly, including collecting and analyzing phone statistics obtained from the CallSweet and ContactSweet systems for purposes of program improvement.
- ▶ Ensures REFER database resources are comprehensive, appropriate and accurate.
- ▶ Compiles, summarizes and arranges data and materials for reports.

Innovation:

- ▶ Evaluate and analyze work to ensure the Helpline process and procedures are efficient and effective, making recommendations as needed.
- ▶ Assist with any special projects as requested

Communication:

- ▶ Assists in the coordination and implementation of special projects, workshops and conferences as assigned to enhance community relations and program development.
- ▶ Must display excellent oral and written communications skills, and must demonstrate mature and professional relationship skills.
- ▶ Represents the Agency at state, regional and local meetings as requested.
- ▶ Conducts presentations on behalf of the Agency for various public audiences as requested.
- ▶ Attends community functions, including those that may take place on weekends, as requested.
- ▶ In conjunction with the Director of Client Services, expands public/private partnerships in each county.
- ▶ Refers individuals in need of community resource assistance to the Elder Helpline.

Other:

- ▶ Provides the Director of Client Services with data analysis with a focus on operational improvements.
- ▶ Attends Agency staff meetings to keep up-to-date on important matters impacting all staff
- ▶ Performs other duties as assigned

**INFORMATION & REFERRAL MANAGER  
(CONTINUED)**

**OTHER COMPETENCIES RELATED TO KNOWLEDGE, SKILLS AND ABILITIES  
AND OTHER PERSONAL CHARACTERISTICS**

- ▶ Proven ability to inspire, lead and manage a multi-generational workforce and cultivate an inclusive environment between team members.
- ▶ Good understanding of the principles of contract management and compliance monitoring techniques, coupled with the ability to apply those principles.
- ▶ Intermediate skill level and knowledge of MS Office Suite including MSWord, Excel, PowerPoint and database creation and maintenance either in Excel or Access.
- ▶ Customer service orientation and the ability to effectively communicate and express ideas (verbally and written)
- ▶ Ability to establish and maintain effective working relationships with others.
- ▶ Ability to establish and maintain professional communications and relationships with various organizations and agencies and be able to effectively interact with other staff members, provider representatives, seniors and other partner organization and community leaders.
- ▶ Knowledge of area programs, community resources and services.
- ▶ Knowledge of REFER system
- ▶ Ability to handle stress, remain composed and cope with a wide range of interpersonal and crisis situations
- ▶ Takes personal responsibility and demonstrates accountability for actions.
- ▶ Ability to establish and maintain effective working relationships with others.
- ▶ Committed to personal/professional growth and development
- ▶ Ability to prepare and write clear, concise technical reports and other business correspondence.
- ▶ Ability to research topics related to services for older adults (Funding, Program Design, etc.), analyze data and provide written and/or oral reports as required.
- ▶ Travel by car is required in this position. The person in this position must be capable of driving a car, and must maintain a valid driver's license and current automobile insurance.

**MINIMUM QUALIFICATIONS**

- ▶ Bachelor's degree from an accredited four-year college or university with a concentration in human services, social work, sociology, psychology, gerontology or other related field of study, plus three years of experience in an agency which provided, planned for or coordinated the provision of human services; or an AA degree plus six years of experience as noted above.
- ▶ Completion of a Master's degree in any one of the above areas may be substituted for one year of experience.
- ▶ The incumbent/candidate must successfully clear a Level II background screening in order to hold this position

**INFORMATION & REFERRAL MANAGER  
(CONTINUED)**

*Physical Requirements*

- ▶ Ability to work under stressful situations
- ▶ Pleasant and clearly understandable telephone voice
- ▶ Ability to lift and carry at least 10 pounds
- ▶ Ability to operate computer and other office equipment
- ▶ Ability to sit at a desk for more than one hour at a time
- ▶ Ability to bend and stoop in order to file and shelve

*Work Environment:*

The work environment characteristics are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

*\* Exempt employees are required to work any hours necessary to perform the duties of the job, including after regular business hours and/or on weekends as required. Exempt employees do not receive overtime or additional pay for hours worked, or travel time expended, outside their regular workday. Working beyond or outside of normal business hours and/or on weekends is expected when necessary in order to complete job responsibilities or when requested by your supervisor.*

**TO APPLY:**

**SEND RESUME AND COVER LETTER (WITH SALARY REQUIREMENTS) TO [JOBS@AAASWFL.ORG](mailto:JOBS@AAASWFL.ORG)**