

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

POSITION TITLE: INFORMATION & REFERRAL (I&R) MANAGER (ELDER HELPLINE CALL CENTER)			DEPARTMENT: CLIENT SERVICES
STATUS: FT	FLSA STATUS: EXEMPT*	SUPERVISE OTHERS: YES	SUPERVISOR: DIRECTOR OF CLIENT SERVICES

GENERAL DESCRIPTION

The Information & Referral Manager provides day-to-day oversight of the Elder Helpline call center team. The Elder Helpline is a toll-free social service call center that assists older adults, adults with disabilities, caregivers and professionals by providing timely, accurate, and appropriate information and referrals to local service providers. The Information & Referral Manager position is an exempt management position on the staff of the Area Agency on Aging for Southwest Florida (AAASWFL).

This position is responsible for managing and coordinating all functions of the Elder Helpline as well providing monitoring, oversight and coordination of quality assurance measures to ensure continuous improvement and compliance with policies, procedures, and regulations. This position serves as a liaison with community agencies regarding the needs of 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.

ABOUT THE AREA AGENCY ON AGING FOR SOUTHWEST FLORIDA (AAASWFL)

Currently celebrating its 40th year of service, Area Agency on Aging for Southwest Florida is a nonprofit organization serving Charlotte, Collier, DeSoto, Glades, Hendry, Lee, and Sarasota Counties. The organization is committed to connecting older adults and adults with disabilities to resources and assistance for living safely with independence and dignity.

AAASWFL is the state’s designated Aging and Disability Resource Center for Southwest Florida. The agency is responsible for monitoring local providers of State and Federally-funded home and community-based elder care services. More information is available at www.aaaswfl.org.

**INFORMATION & REFERRAL MANAGER
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RESPONSIBILITIES

Management:

- ▶ Participates in the selection, training and orientation of new Helpline staff
- ▶ Supervises, counsels, mentors and evaluates team members, providing guidance and technical direction.
- ▶ 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 and approve employee timesheets
- ▶ 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 policies and procedures
- ▶ Serves as backup manager to the ADRC Manager in his/her absence.

Planning and Organization:

- ▶ Plan and prioritize work flow of unit to provide efficient, timely and friendly service
- ▶ Supervises the coordination of the workflow and the referral process between the Information & Referral staff 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 impairments
- ▶ 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.

Quality and Continual Improvement:

- ▶ Conducts quality assurance activities to include live call monitoring and case review of documentation and correspondence 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.

**INFORMATION & REFERRAL MANAGER
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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, and state-funded aging and disability programs
- ▶ Responsible for ensuring compliance with program requirements and regulations, 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.
- ▶ Reviews and analyzes data and prepares reports for planning purposes as well as monthly submission to the Department of Elder Affairs.
- ▶ Ensures database resources are comprehensive, appropriate and accurate.

Innovation:

- ▶ Evaluate and analyze work to ensure the Helpline processes 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 to enhance community relations and program development.
- ▶ Must display excellent oral and written communications skills, including public speaking, 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.

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

**INFORMATION & REFERRAL MANAGER
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- ▶ Performs other duties as assigned

**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 database systems
- ▶ 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 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 human services; or an

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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.
- ▶ Minimum two years of management experience, preferably in a social service, health care, or call center setting.
- ▶ The incumbent/candidate must successfully clear a Level II background screening and drug screening in order to hold this position.

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.*

TO APPLY:

An online assessment is required for this position. Please complete the assessment at: <https://www.ondemandassessment.com/link/index/jb-udsou7at6>. You will be prompted to provide your resume online at the time of your assessment. Only candidates who complete the online assessment and provide their resume through the testing link will be considered for this position.