



Job Title: Case Worker, Financial Opportunity Center

Classification: Full-Time (32 hours/week)

Pay: \$21 per hour

Hours: Monday – Friday between 8 am to 5 pm. Occasional hours in the evenings and weekends.

Reports to: FOC Supervisor

Work Location: In-Person

Casa Familiar (Casa) was founded in 1973 and is a 501(c)(3) community-based organization dedicated to serving residents in South San Diego County and specifically the border community of San Ysidro.

The mission of Casa Familiar is to enhance quality of life for people living in underserved and underrepresented communities.

Casa Familiar Values: Integrity, Respect, Familia, Culture & Community

About this Position

Casa Familiar is hiring a Financial Advisor for the Department of Financial Opportunity Center (FOC) who will be responsible for providing services and assisting underserved and underrepresented communities in South San Diego. FOC's core services include income support, employment services, financial education, case management, and transitional housing. Under the supervision of the FOC Supervisor, the Advisor works with community members in the preparation, filing, and monitoring of diverse services in the daily functions of the FOC department. This position must be staffed by an individual who has strong advocacy, communication and writing skills, case management experience, and works well with others. This position will be assigned to additional programs based on program needs.

Key Responsibilities

The following responsibilities are those considered to be essential, but do not represent all the job functions that may be required to be performed by this position. Other comparable duties and responsibilities may be assigned as needed. Responsibilities may overlap with other programs.

- The Financial Advisor, under supervision of the FOC Supervisor, provides direct services to low to moderate-income individuals from underserved and underrepresented communities.
 - Financial counseling and coaching involve an ability to engage and motivate clients, a strong understanding of personal finances, and the ability to teach financial education to others through workshops and 1:1 case management.
 - Employment services involve assisting community members to identify growth for advancement in their current career, resume-building, application support, and/or post-hire paperwork.
 - Income supports specialists assist clients in finding ways to supplement their income, or reduce their expenses through benefit screening, application support (both on paper and online), and troubleshooting and advocating for community members to receive benefits that they are eligible for.
 - Transitional Housing involves screening community members for program eligibility, enrollment, case management, connection to internal and external resources, assistance with securing permanent housing, and successful transition out of program.



- Maintain accurate and up-to-date physical and electronic files (Salesforce database) and detailed case notes for program participants. Successfully meet all case reporting requirements within established deadlines.
- Complete assigned internal program report track sheets.
- Tax preparation to which training will be provided.
- Conduct consultations with community members as necessary and in a private setting.
- Immediately elevate concerns with services and those brought forward by program participants to FOC Supervisor and present possible solutions
- Communicate program needs to FOC Supervisor
- Collaborate with staff and other departments to address the needs of community members
- Work with team and provide services and outreach activities off-site in community and social services centers to support program implementation to achieve high quality, efficient and impactful program outputs and outcomes in accordance with grant agreements, work plans and best practices.
- Participation in special projects and activities related to agency's goals and objectives.
- Participation in community events, including fundraisers, all-staff meetings, regularly scheduled team meetings, supervision meetings, and other meetings assigned
- Assist the community event committee assigned to and successfully complete the responsibilities assigned
- Adheres to Casa Familiar policies and procedures and meets all legal, contractual, financial and other compliance requirements.
- Represent Casa Familiar in a positive and professional manner.
- Supports the mission, vision, and values of Casa Familiar.
- Other duties as assigned by the Chief Programs Officer, Programs Officer, and/or Community Services Director.

Education & Experience

- High School Diploma, bachelor's degree in social work or any additional field relevant to Casa Familiar's mission and programs is preferred
- A minimum of 2 years of experience providing case management to underserved and underrepresented communities in the areas of income support, affordable housing, unemployment, and financial education
- Knowledge of resources available in San Diego County, including income support, affordable housing, and employment resources
- Experience with Microsoft Office programs
- Reliable transportation and must possess a valid California Driver's License (Required)
- COVID-19 full vaccination

Essential Skills

- Excellent advocacy skills and committed to serving underserved and underrepresented communities
- Fluent in English and Spanish (oral and written)
- Ethical and professional
- Reliable and punctual
- Effective verbal and written communication skills
- Positive attitude and team player



- Patient, resourceful, and motivated to problem solve
- Organizational skills and attention to detail
- Ability to meet deadlines and goals
- Ability to multi-task

On the Job Training Requirements:

1. FOC Trainings
2. Tax Preparation Accreditation
3. Salesforce Training
4. Successfully pass required background check

Additional

This position requires sitting at a desk or workstation, walking, standing, climbing stairs, hearing, speaking, being able to lift up to 25 lb. and able to drive to different locations and do other errands pertaining to organizational operations. A background check is required. In compliance with federal law, all persons hired will be required to verify identity and eligibility to work in the United States and to complete the required employment eligibility verification document form upon hire. This is a full-time position with occasional work responsibilities on weekends and/or evenings, depending on the season calendar.

Benefits:

- Medical, dental, vision, and life insurance
- Retirement: 403(b) – Casa contributes 3% of the annual income.
- Paid Time Off
- Paid Bereavement
- Paid Jury Duty
- Employee Retention Benefit

Casa Familiar is an equal employment opportunity employer. Casa does not and shall not discriminate based on race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.

If you have any questions, please send an email to hr@casafamiliar.org and include your first and last name, along with the position title for which you are applying, in the subject line of the email.