



CAREER OPPORTUNITY PROFILE

TITLE: Money Management Support Specialist
CLASS: Clerical Specialist
Community Services
Part-Time Regular (20 hrs/wk)

Job # 201831
Opens: 10/10/18
Open until filled

ABOUT OUR AGENCY

Oregon Cascades West Council of Governments (OCWCOG) member agencies are located in the Willamette Valley and the Central Oregon Coast. The rugged Oregon seacoast, the high mountain passes of the Oregon Cascades, lush greenery, and the agricultural abundance of the Valley are an attractive addition to an education, employment, and cultural hub.

The Willamette Valley is positioned at the foot of the Oregon Coast Range and comprises some of the most fertile and lush farmland in the Northwest. Stretching just below the Oregon-Washington border to the city of Eugene, the Willamette Valley has long been considered the heartland of Oregon. OCWCOG serves two counties in the Valley, Benton and Linn, which contain the regions two biggest cities, Corvallis and Albany, Oregon State University, 18 smaller and diverse jurisdictions, including Lebanon and Philomath, and a multitude of housing, school, dining, and shopping option.

OCWCOG is located in the southern tip of the Valley and a one-hour drive to Portland and 40 minutes to Eugene – the region’s major airports and gateways; and, a twenty-minute drive to Salem, Oregon’s State Capitol, where many of OCWCOG’s funding agencies and partners are found. The Southern Willamette Valley is best known for its agriculture and its innovation, which include a flourishing wine industry, innovation accelerators, a growing start-up culture, high-tech industry and access to tens of thousands of students, professionals, and entrepreneurs affiliated with Oregon State University , Samaritan Health Systems, Linn-Benton Community College, Hewlett-Packard, the U.S. Department of Energy, and hundreds of other businesses, non-profits, agencies, and community partners. The Valley is divided into two distinct wine appellations, both known for their rich and robust Pinot Noir and exceptional Pinot Gris. Hazelnuts, raspberries, and Christmas trees are major exports of the Willamette Valley.

The Oregon Coast is proof of the Northwest’s amazing diversity and its 350-mile coastline is anything but mundane. The Cities of Newport and Toledo anchor OCWCOG’s presence in Lincoln County and provide access to multiple working ports, harbors, and bays, and a historic logging and fishing culture. Oceanic and atmospheric research are conducted by the National Oceanographic and Atmospheric Agency and Oregon State University among others – spinning off innovation and industry in fisheries, energy, resource management, and tourism.

ABOUT THE COMMUNITY SERVICES PROGRAM

The Community Services Program (CSP) department facilitates the coordinated operation of a portfolio of community-based services designed to assist program participants maintain their health, wellness, and connection to the community. CSP programs serve older adults, individuals with long-term physical disabilities, and Veteran populations, with the outcome of assisting clients to maintain health, independence, and dignity. Several CSP programs offer a variety of volunteer and advocacy opportunities, and coordinate a number of community events throughout the Region.

CSP works closely under the Cascades West Area Agency on Aging (CWAAAA) umbrella with Senior and Disability Services (SDS), and is primarily funded through the Older Americans Act (OAA), Oregon Project Independence (OPI), fundraising, and State and County and federal contracts. In addition to the programs listed below, the department also assists with the

development of cross-departmental and community-based initiatives as opportunity arises. CSP collaborates with SDS and Community Economic Development (CED) in delivering identified special contracts.

OCWCOG is the lead agency for the ADRC in Linn, Benton, and Lincoln Counties. The ADRC works in collaboration with other existing health and community agencies to be a highly visible, trusted source of information. The service is available to people of all ages, income, and disability types who have questions on the full range of long-term care support options in the community. The goal of the ADRC is to empower people to make informed decisions about long-term care support and to help them easily access support and services for themselves or someone they care about.

After an initial consultation with an ADRC specialist, consumers may access a variety of services including the Oregon Health Plan (OHP); Supplemental Nutrition Assistance Program (SNAP); Long-term Services and Supports (LTSS); Adult Protective Services (APS); Older American Act (OAA) Programs; Oregon Project Independence (OPI); Meals on Wheels (MOW); Senior Corps Programs, such as Foster Grandparent Program (FGP) and Retired and Senior Volunteer Program (RSVP); and Veteran Services for residents in Benton County.

OCWCOG's *Money Management Program* provides free assistance with personal money management tasks through specially trained volunteers. Service is personalized, confidential, and safe. All *Money Management Program* services are offered free of charge to eligible individuals.

GENERAL INFORMATION

This announcement will remain open until filled; however, the application screening process is expected to begin on or about October 23, 2018. Therefore, at the agency's discretion, materials received after October 23, 2018 may not receive consideration.

This position is represented by the Service Employees International Union (SEIU) Union.

If you are offered employment, the offer will be contingent upon the outcome of a criminal records check, and the information will be shared with Human Resources. Any criminal history will be reviewed and could result in the withdrawal of the offer or termination of employment.

DUTIES AND RESPONSIBILITIES

- Assists with volunteer coordination by reviewing applications for completeness, preparing files and maintaining records, contacting potential volunteers for initial interview, and coordinating orientation
- Prescreens client referrals for completeness
- Assists with updating client information, coordinating transactions and vendor communications as assigned
- Performs data entry of client information into program software as assigned; ensure records are accurate and reconciled
- Prepares for monthly monitoring visit by verifying appropriate documentation is in file and assists with any follow up required
- Assists in preparing monthly invoicing and other routine processes as assigned
- Maintains day-to-day case filing as needed, including purging of appropriate documents
- Schedules volunteer and/or client appointments as assigned by Program Coordinator
- Provides general clerical support to the Program Coordinator, program volunteers, and/or clients, as directed

- Respond to information requests via phone and email
- Answer general inquiries regarding Money Management program

QUALIFICATIONS, REQUIRED AND REQUESTED SKILLS

MINIMUM QUALIFICATIONS:

To receive credit, and proceed to the next step of the recruiting process, your application form must clearly show that you meet the following:

Completion of high school, or equivalent, and six (6) months of paid and/or volunteer clerical experience; one year of clerical experience; OR, any satisfactory equivalent combination of education, experience and training which demonstrates the knowledge, skills, and abilities to perform the duties of the job.

DESIRED ATTRIBUTES:

- Knowledge of confidentiality rules regarding client and provider records, including HIPAA regulations;
- Knowledge of spelling and business grammar;
- Knowledge of household budgeting and daily money management;
- Ability to accurately balance financial transactions;
- Ability to effectively communicate, both orally and in writing;
- Ability to work with a variety of individuals including people with physical or mental impairments, and varying socioeconomic backgrounds;
- Ability to work independently and effectively handle multiple tasks, paying attention to detail;
- Ability to type accurately at 60 wpm;
- Skills in operating a personal computer including: keyboarding, Microsoft Word, Excel, and Outlook;
- Skills in using state terminal system and/or other business software and databases;

COMPENSATION PACKAGE

The starting pay range for the Clerical Specialist is \$14.72 - \$16.21/hourly depending on qualifications. Plus generous paid leave; tax deferred plans; and fully-paid retirement benefits.

TO APPLY

An application and detailed job description is available at www.ocwcog.org/careers. **You must submit the following application materials:**

- An **OCWCOG Employment Application**.
- A **current resume** that clearly describes your experience, skills, and/or knowledge related to the requirements of the position and demonstrates that you meet qualifications of the position listed above.
- A **cover letter** explaining how your background, experience and training qualify you for this position. **Please describe your experience and training specifically as they relate to the Desired Attributes.**
- If you are an eligible veteran and wish to claim veterans' preference points AND you also meet the minimum qualifications for this position, the points will be added to your score. To receive veterans' preference points, you **MUST** attach to your application materials the following required documentation:
 - A copy of your DD214/DD215 form; OR a letter from the US Dept of Veteran's Affairs indicating you receive a non-service connected pension for the five (5) point preference.
 - A copy of your DD214/DD215 form; AND a copy of your veteran's disability preference letter

from the Dept. of Veterans' Affairs for the ten (10) point preference.

The first review of applications will on or around October 23rd, 2018. For immediate consideration, apply now. Only complete applications will be considered. Be sure to attach any required documents. The selection process will consist of a review of the materials provided and an evaluation of experience and training. Candidates most closely matching the desired attributes will be invited to interview.

SUBMIT TO

Oregon Cascades West Council of Governments
Human Resources Department
1400 Queen Ave SE, Suite 201
Albany, Oregon 97322

You may **E-MAIL** your application materials to us at hrrecruit@ocwcog.org. **In the subject line please include the position title and the posting number.** By electronically submitting your application, you agree to the conditions stated in the certification and signature section of the application, which is enforceable as if you had signed. You will receive confirmation of receipt only if you submit via e-mail.

FAX to 541-967-6123. We are unable to verify receipt of faxed applications. OCWCOG is not responsible for material that is illegible or missing because of transmitting by fax or which may be lost through the mail.

JOB DESCRIPTION

Title: **Office Support Specialist**
Position Classification: Clerical Specialist
Department: Money Management Program
Reports to: Community Services Program Director

SUMMARY OF POSITION

Provides clerical support to the Money Management program.

ESSENTIAL JOB DUTIES

Performs position duties in a manner that promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully. Engages in effective team participation through willingness to assist and support co-workers, supervisors, and other work related-associations. Develops good working relationships with division and agency staff and supervisors through active participation in accomplishing group projects and in identifying and resolving problems in a constructive manner. Demonstrates positive acceptance of constructive feedback and suggestions, in an effort to strengthen work performance. Contributes to a positive, respectful and productive work atmosphere. Regular attendance is required to meet the demands of this job and to provide necessary services.

- Assists with volunteer coordination by reviewing applications for completeness, preparing files and maintaining records, contacting potential volunteers for initial interview, and coordinating orientation
- Prescreens client referrals for completeness
- Assists with updating client information, coordinating transactions and vendor communications as assigned
- Performs data entry of client information into program software as assigned; ensure records are accurate and reconciled
- Prepares for monthly monitoring visit by verifying appropriate documentation is in file and

assists with any follow up required

- Assists in preparing monthly invoicing and other routine processes as assigned
- Maintains day-to-day case filing as needed, including purging of appropriate documents
- Schedules volunteer and/or client appointments as assigned by Program Coordinator
- Provides general clerical support to the Program Coordinator, program volunteers, and/ or clients, as directed
- Respond to information requests via phone and email
- Answer general inquiries regarding Money Management program

OTHER JOB DUTIES

- Assists with opening, date stamping, and distributing mail.
- Other related support staff duties as assigned by supervisor.

MENTAL & PHYSICAL JOB SKILLS

R = Rarely (< 1%)
F = Frequently (34% - 66%)

O = Occasionally (1% - 33%)
C = Continuously (67% - 100%)

Mental

- | | | |
|---|--|---------------------------|
| (C) Basic Math (add, subtract, multiply, divide) | (F) Reasoning/Judgment/Decision Making | |
| (C) Detail/Accuracy | (F) Initiative | (O) Research |
| (C) Memory | (F) Creativity | (O) Brainstorming/Concept |
| (C) Teamwork | (F) Management of Stress | (R) Mentoring |
| (C) English Comprehension | (F) Adapting to Constant Change | (R) Presentation/Teaching |
| (C) Timeliness | (F) Coordination of Multiple Tasks | (R) Selling |
| (C) Interpersonal Skills | (F) Client/Service Skills | (R) Persuasion |
| (C) Written English Communication | (F) Organization/Planning | (R) Negotiation |
| (O) Advanced Math (analysis, statistics, significant data or number manipulation) | | |

Physical

- | | | |
|--|--------------------------------|----------------------|
| (C) Computer/Keyboard/mouse track ball use | | |
| (C) Vision (1-10 ft) | (F) Stooping | (R) Pushing |
| (F) Sitting | (F) Handling | (R) Pulling |
| (F) Standing | (O) Walking | (R) Acute Color |
| (F) Hearing | (O) Kneeling | (R) Climbing |
| (F) Reaching | (O) Lifting 5 lbs/day | (R) Crawling |
| (F) Talking | (O) Carrying 10 lbs/day | (R) Tasting/smelling |
| (F) Vision (10-20 ft) | (O) Long range vision (20+) | |
| (F) Eye/hand coordination | | |

WORKING ENVIRONMENT

Work is performed primarily in an office environment utilizing a personal computer, telephone and a variety of office equipment. Position requires sitting for long periods of time performing computer work, proofreading, and filing with frequent interruptions. Work involves reaching overhead and stooping periodically in order to file in large lateral file cabinets. Occasional travel to run errands on behalf of the program and various meetings is also required

SUPERVISION RECEIVED

Receives general supervision from the Community Services Program Director. Receives daily tasking from the Money Management Program Coordinator.

SUPERVISORY RESPONSIBILITIES: None.

MINIMUM QUALIFICATIONS

Experience & Training

Completion of high school, or equivalent, and six (6) months of paid and/or volunteer clerical experience; one year of clerical experience; OR, any satisfactory equivalent combination of education, experience and training which demonstrates the knowledge, skills, and abilities to perform the duties of the job.

Knowledge, Skills and Abilities

Knowledge of confidentiality rules regarding client and provider records, including HIPAA regulations;
Knowledge of spelling and business grammar;
Knowledge of general office practices including alpha and numerical filing systems;
Knowledge of household budgeting and daily money management;
Ability to accurately balance financial transactions;
Ability to accurately perform basic math;
Ability to effectively communicate, both orally and in writing;
Ability to understand and follow oral and written instructions;
Ability to operate a variety of standard office machines, including a multi-line telephone system;
Ability to work with a variety of individuals including people with physical or mental impairments, and varying socioeconomic backgrounds;
Ability to work independently and effectively handle multiple tasks, paying attention to detail;
Ability to type accurately at 60 wpm;
Ability to learn database system(s);
Skills in operating a personal computer including: keyboarding, Microsoft Word, Excel, and Outlook;
Skills in processing documents, verifying, and checking for accuracy, with attention to detail
Skills in using state terminal system and/or other business software and databases;
Skills in performing detailed and complex clerical tasks.

Licenses, Certificates, & Other Requirements

Must successfully complete on-line HIPAA training within fourteen (14) days of employment.

Position requires successful completion of a criminal history and driving record check.

This job description in no way states or implies that these are the only duties to be performed by an employee occupying this position. Employees are required to follow any other job-related instructions and to perform any other job-related duties requested by their supervisor.

Requirements are representative of minimum levels of knowledge, skills and abilities. To successfully perform this job, the employee will possess the abilities or aptitudes to perform each duty proficiently.

10/18

EQUAL OPPORTUNITY EMPLOYER

Cascades West Center, 1400 Queen Ave., SE Suite 201, Albany, Oregon 97322

◆ Phone (541) 967-8720

◆ Fax (541) 967-6123

◆ TTY (541) 928-3670