

**JOB DESCRIPTION**  
**CSBG LEAD CASE MANAGER/TRAINER**

Full-time; Non-exempt

**I. GENERAL DESCRIPTION**

The Lead Case Manager/Trainer acts as a liaison between the Agency and the population it serves. By working in the community, the lead case manager/trainer should provide knowledge of the agency and community resources. In some cases, the lead case manager/trainer must perform direct services in order to secure the skills, knowledge, motivation, opportunities, and services for low-income families to become self-sufficient and to work toward removing structural barriers to self-sufficiency. The lead case manager/trainer acts as the liaison between other case managers within a specific service area and the Program Director. The lead case manager/trainer provides training and technical support assistance to those case managers within that specific territory.

**II. QUALIFICATIONS**

- A. Education: High School or GED required. 2-3 years of customer service experience preferred. Completion of two years (sixty credit hours) from an accredited college; may substitute full-time customer service, complex clerical, secretarial or closely related experience for required education on a year-for-year basis.
- B. Experience: One additional year full-time case management, eligibility specialist or closely related experience required. This position requires that someone whom is capable of communicating both written and verbally with the public and staff in a professional, polite, and respectful manner. Experience with the SHAH software highly preferred.

**III. PERSONAL QUALITIES**

S/he must be sincerely interested in the problems of the poor and willing to work with the low-income family unit by having a sincere interest in helping people, with a willingness to participate in local projects, and ability to encourage others to do so. S/he must be supportive of Tri-County, its' programs, and objectives. S/he must be skilled in the use of computer hardware and software for word processing and data entry retrieval. Typing skill of at least 30 WPM is required. S/he must be physically able to effectively perform the duties and requirements of the job. S/he must be able to operate a variety of automated office machines, including computers, copiers, faxes, telephones, calculators, etc. S/he must be highly organized and capable of prioritizing with effective time management skills. S/he must have considerable skills in working under pressure and meeting deadlines. S/he must have considerable skills in basic mathematical computations. S/he must be able to comprehend and become knowledgeable of federal laws and regulations relevant to all program areas of Tri-County. S/he must be able to lift between 20-25 lbs. S/he must have a valid Texas driver's license and be insurable by the agency's insurance company.

**IV. SPECIFIC AREAS OF RESPONSIBILITY**

- Provide professional and courteous customer care to both external and internal customers.
- Work closely with low-income family and resource agencies in order to make referrals.
- Depending on funding availability, provide a minimum of 4 client intakes each day and complete necessary paperwork required to be maintained in the case file.
- Interview, assist and certify clients, and complete required paperwork under the CSBG/CEAP, Weatherization, EFSP, local utility programs, and any other emergency funded program.
- Ensure that all information is correct, completed, entered in the SHAH system, maintained in the case file and then filed in a secure location at the end of each working day.
- Plan, coordinate, and implement community projects and programs, such as recycling clothing, distribution of clothing, collection of clothing, family budgeting, family planning, and any other projects and programs which will meet the needs of the low-income family unit.
- Attend weekly staff meetings and work sessions either by conference calls or at the central office in Center, TX.
- Work with community leaders in order in order to maintain effective working relationships and to develop community support and establish needs of the community.
- Effective time management skills required to meet needs of clients.
- Assist with other paperwork as needed for the client to obtain service from other local, state, and federal agencies.
- Respond to inquiries and complaints from customers in a timely manner.
- Prepare and provide to supervisor, complete weekly schedules, time sheets, mileage sheets, travel sheets, follow-up reports, leave requests, and any other forms required in a timely manner.
- Attend workshops and training sessions as assigned. May include out-of-town, overnight travel.
- Due to limited travel allowance, the following conditions will be necessary: maximum use of phone facilities; request for travel forms must be completed prior to traveling; and schedule all traveling in order to receive the maximum benefits.
- Responsible for providing case management to no less than 5 clients per year; with the intent of transitioning 3 out of poverty.
- Responsible for training those case managers located in the service areas that he/she oversees.

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- Conducts surveys and assessments to ensure the needs of the low-income families are met.
- Responsible for ensuring that case managers in his/her service areas are correctly case managing clients properly by monitoring case files within his/her service area.
- Participate in the planning and evaluation sessions with other case managers and supervisors to improve the services and projects provided by the Agency.
- Documents all actions taken.
- Attends work regularly according to Agency leave policy.
- Complies with all agency policies and procedures, including but not limited to applicable security and safety rules, regulations and standards.
- Perform other program related tasks and duties required or assigned by supervisor.

**V. SUPERVISORY DUTIES**

Some supervisory duties may apply. S/he oversees the activities and duties of other case managers in the surrounding counties. S/he may act as the supervisor in the absence of the Social Services Director.

**VI. IMMEDIATE SUPERVISOR**

Social Services Director

COPY RECEIVED BY: \_\_\_\_\_

DATE: \_\_\_\_\_