



**CASE MANAGER I  
CASE MANAGER II  
CASE MANAGER III**

### **Definition**

Housing Matters is looking for individuals eager to make a difference and willing to enthusiastically commit to join in our vision that homelessness in Santa Cruz County should be rare, brief and non-recurring. Under direction, Case Managers I, II, and III will carry a service caseload providing housing stabilization social services; develop service plans which may include the need for specialized social services.

### **Distinguishing Characteristics**

Factors used in allocating positions to classes in this series include: complexity, sensitivity and difficulty of casework problems; duration and level of casework intervention; authority for decision making; likelihood and consequence of error; the emergency or crisis nature of services; degree of supervision received; and lead/consultative responsibilities for other Case Managers.

**Case Manager I** is the entry level class and is expected to develop knowledge of the policies and administrative procedures of HOUSING MATTERS supportive services programs, to learn the principles of human behavior and development as related to homelessness and housing, to develop interviewing, counseling, assessment, caseload organization and management skills and to use community resources. Incumbents are expected to gain the knowledge and abilities to promote to Case Manager II.

**Case Manager II** is the journey level class and is expected to work with a minimum amount of supervision. Incumbents are required to use assessment, interviewing and counseling skills to perform moderate to complex casework services. Some positions may act as lead case manager. Incumbents assigned to these services work are expected to gain through training and experience the knowledge and abilities to promote to Case Manager III.

**Case Manager III** is the advanced level class. Incumbents spend a substantial part of their time on the most difficult, sensitive and specialized services where major case decisions are made independently and where consequence of error may be significant. Advanced casework skills, a high degree of program knowledge, judgment and creativity are required. Incumbents may, as an additional duty, serve as an alternate supervisor or in a lead capacity.

### **Typical Job Duties**

- Perform intake interviews, assessments, and assist participants in developing individual case plans.
- Facilitate participants' pathway to permanent housing in coordination with housing navigator and other programs, agencies, and organizations.
- Provide ongoing case management including assessment, referrals, budget assistance, housing placement, and promoting housing stability with individuals as assigned.
- Accept each participant for who they are and where they are, and then provide options, information and choices that allow for stimulating change.
- Develop and maintain accurate written case records including intake, assessment, ongoing case plan, and progress notes.
- Meet all administrative requirements including recordkeeping, HMIS, staff meetings, etc.
- Maintain confidentiality and treat participants with dignity and respect at all times.
- Assist in overall administration of program.
- Perform other duties as assigned.

## **Employment Standards**

### **Case Manager I**

Working knowledge of:

- social and economic factors which influence individuals and/or households experiencing homelessness;

Some knowledge of:

- community resources.
- public social service and assistance programs.
- reactions to stress.
- interviewing and record keeping techniques.

### **Case Manager II**

Working knowledge of:

- social casework objectives, principles, methods, and caseload management and organization.
- social and economic factors which influence individuals and/or households experiencing homelessness.
- principles of human behavior and development and psychological defense mechanisms.
- reactions to stress.
- community health, welfare, social, and legal support systems, and other resources available to clients.
- interviewing and record keeping techniques, including the documentation of all actions and contacts in case files.

Some knowledge of:

- the specialized program area to which assigned.
- the policies, and administrative procedures of Housing Matters supportive services programs.

### **Case Manager III**

Thorough knowledge of:

- social casework objectives, principles, methods, and caseload management and organization.
- social and economic factors which influence individuals and/or households experiencing homelessness.
- principles of human behavior and development and psychological defense mechanisms.
- reactions to stress.
- community health, welfare, social, and legal support systems, and other resources available to clients.
- interviewing and record keeping techniques, including the documentation of all actions and contacts in case files.
- the specialized program area to which assigned.
- the policies, and administrative procedures of Housing Matters supportive services programs.

Working knowledge of:

- the policies and administrative procedures of Housing Matters supportive services programs.
- techniques used to locate and determine client benefit eligibility may be required for certain positions.
- grant compliance reporting may be required for certain positions.
- Some knowledge of the principles and techniques of supervision and training may be required for certain assignments.

**Ability to:**

### **Case Manager I**

- Learn to apply casework skills to identify the client's problems.
- Learn to formulate and modify case plans in conjunction with clients.
- Learn to interview effectively, gather information and engage the client in the problem-solving process.
- Learn to manage assigned caseload and establish caseload priorities to meet client needs and agency expectations.
- Understand and explain agency programs, limitations, regulations and policies.
- Use community and agency resources.
- Communicate effectively in written and oral form.
- Maintain current and accurate records.

- Communicate and relate effectively with clients, who may be emotionally or mentally disabled, medically disabled, elderly, substance abusers, victims of domestic violence or fiduciary abuse.
- Establish and maintain effective working relationships with others, including clients, family members and others who may be under distress or duress.
- Learn complex regulations, policies and procedures and apply them appropriately in management of assigned caseload.
- Work effectively under pressure and deadlines.
- Recognize and analyze problems, gather relevant information, establish facts, draw valid conclusions, and respond to case details promptly.
- Deal with hostile, aggressive and abusive persons.

### **Case Manager II**

- Communicate and relate effectively with clients, who may be emotionally or mentally disabled, medically disabled, elderly, substance abusers, victims of domestic violence or fiduciary abuse.
- Establish and maintain effective working relationships with others, including clients, family members and others who may be under distress or duress.
- Locate, develop, and use community and agency resources for the benefit of clients and advocate for services on behalf of clients.
- Facilitate maximum client participation in service plans.
- Manage assigned caseload and establish caseload priorities to meet client needs and agency expectations;
- Acting as a lead worker over a small group of case managers may be required for some positions.
- Prioritize and respond to demands of caseload in a prompt and efficient manner.
- Recognize and analyze problems, gather relevant information, establish facts, draw valid conclusions, respond to case details promptly, and communicate clearly and concisely both orally and in writing.
- Maintain current and accurate records.
- Learn complex regulations, policies and procedures and apply them appropriately in management of assigned caseload.
- Work effectively under pressure and deadlines.
- Deal with hostile, aggressive and abusive persons.

### **Case Manager III**

- Perform the most complex and specialized casework services with considerable independence.
- Deal with crisis situations.
- Deal with hostile, aggressive and abusive persons. Provide leadership and consultation to other case managers in casework concepts and methodology.
- Communicate and relate effectively with clients, who may be emotionally or mentally disabled, medically disabled, elderly, substance abusers, victims of domestic violence or fiduciary abuse.
- Establish and maintain effective working relationships with others, including clients, family members and others who may be under distress or duress.
- Locate, develop, and use community and agency resources for the benefit of clients and advocate for services on behalf of clients.
- Facilitate maximum client participation in service plans.
- Manage assigned caseload and establish caseload priorities to meet client needs and agency expectations;
- Acting as a lead worker over a small group of case managers may be required for some positions.
- Prioritize and respond to demands of caseload in a prompt and efficient manner.
- Recognize and analyze problems, gather relevant information, establish facts, draw valid conclusions, respond to case details promptly, and communicate clearly and concisely both orally and in writing.
- Maintain current and accurate records.
- Learn complex regulations, policies and procedures and apply them appropriately in management of assigned caseload.
- Work effectively under pressure and deadlines.

**Training and Experience: Any combination of training and experience which would provide the required knowledge and abilities is qualifying. Typical ways to obtain these knowledge and abilities would be:**

Case Manager I: A minimum of two years of directly related training or experience which would demonstrate the application of the knowledge and abilities,

OR

Successful completion of twenty-four (24) semester units in social welfare, social human services, sociology or other behavior science from a recognized college that demonstrates possession of the required knowledge and abilities.

Case Manager II: A minimum of one year of experience performing social service casework services comparable to a Case Manager I at Housing Matters in an exceptional manner exceeding all standards and abilities,

OR

A Bachelor's Degree from an accredited college with a major in social work, social welfare, human services, or one of the social or behavioral sciences.

Case Manager III: A minimum of two years of experience performing social service casework services equivalent to a Case Manager II at Housing Matters in an exceptional manner exceeding all standards and abilities,

OR

A Master's Degree in social work, social welfare, human services, or one of the social or behavioral sciences plus one year of social service casework experience.

## **SPECIAL REQUIREMENTS**

- Possession of a valid California Class C Driver's License or must be able to provide suitable transportation which is approved by the organization may be required for certain positions.

## **HOURS**

- This is a full time, hourly, benefited, non-exempt position. Occasional evenings and weekends required. Health Insurance and PTO benefits begin after 90-day introductory period.

## **Application Process**

Please email a cover letter and resume to the attention of Human Resources at [recruiter@housingmatterssc.org](mailto:recruiter@housingmatterssc.org). No phone calls or faxes. Housing Matters is an Equal Opportunity Employer.