

Advancing Results through Case Managers

Case Manager Job Descriptions

Mica O'Brien and Sarah Gillespie

August 2020

Promise Neighborhoods grantees use the following job descriptions to outline and describe their case manager positions. Most include a brief description of the grantee organization and the Promise Neighborhood, necessary qualifications, responsibilities, expectations of successful case managers, and an overview of the service population. The job descriptions can be used to inform case manager positions at other Promise Neighborhoods or organizations and/or adapted for use in other communities.

Contents

Albina-Rockwood Promise Neighborhood Initiative (Portland, Oregon)	2
Berea College Knox Promise Neighborhood (Knox County, Kentucky)	4
Chula Vista Promise Neighborhood and San Diego Promise Neighborhood (California)	6
Deer Creek Promise Neighborhood and Indianola Promise Community (Mississippi)	7
Hayward Promise Neighborhoods (California)	10
Mission Promise Neighborhood (San Francisco)	11
Promise Heights (Baltimore)	14

Albina-Rockwood Promise Neighborhood Initiative (Portland, Oregon)

JOB DESCRIPTION: PROMISE NEIGHBORHOOD IN-SCHOOL COORDINATOR

The Albina-Rockwood Promise Neighborhood Initiative is designed to drive equity through integrated, evidence-based culturally specific and responsive services in the Albina (N/NE Portland) and Rockwood (East County) neighborhoods in Multnomah County. In collaboration with six community-based organizations, this initiative will serve schools in both the Portland Public and Reynolds School districts to provide a “cradle to career” pipeline of services to students and families supporting a successful transition into college and/or career. The In-School Coordinator is responsible for implementing the Self Enhancement, Inc. (SEI) model for a caseload of 35–40 students at a specific middle school or high school site. SEI’s approach to service is comprehensive and serves the “whole child” and crosses all of their environments: home, school and community. To effectively provide services across these environments, the Coordinator develops partnerships with parents, schools, and community organizations. The Coordinator provides intensive case management, in school, after school, and summer programming that provides opportunity to consistently encourage youth development and create positive contributing citizens. Coordinators establish meaningful relationships with youth and their families based on mutual respect. By using this model, Coordinators gain permission to guide, teach, motivate, and inspire youth. This is a full-time position with full benefits and will report to the In-School Program Manager.

PRIMARY RESPONSIBILITIES

- Develop strong bonding with students and their parents utilizing SEI’s relationship model.
- Create an Individual Success Plan (ISP) supporting school performance and academic, social, and career goals.
- Provide classroom instruction and tutorial assistance.
- Provide individual and group advocacy.
- Develop, facilitate, and coordinate activities for after-school and summer programming.
- Monitor daily attendance, behavior, and academic progress of participants.
- Enter data into Efforts to Outcomes (ETO) database, including case notes, ISP, student participation, etc., on a weekly basis.
- Serve as advocate between students and school staff.
- Attend parent/teacher conferences as needed.
- Attend and participate in regular agency and school staff meetings.
- Maintain records and files ensuring confidentiality for all students.
- Coordinate program activities and student participation with Parent Coordinator.

- Prepare a monthly narrative program report and any other required documentation.
- Accept other appropriate duties/responsibilities as assigned.

QUALIFICATIONS

- A bachelor's degree in education, psychology, or a related field is required. A minimum of two years of college level study; two years of experience directly working with youth in an educational environment may be substituted for education requirement.
- Case management experience highly desired.
- Must have effective interpersonal skills with the ability to interact with people of varying social, economic, and educational backgrounds
- Must have the ability to successfully motivate and connect with others.
- Ability to be a positive role model and maintain positive relationships.
- Must have excellent writing skills and basic computer knowledge.
- Must be highly organized and self-motivated with effective time-management skills.
- Must have excellent writing skills and basic computer knowledge.
- Willingness to work flexible hours, including some evenings and weekends.
- Must have a valid driver's license and must be insurable under SEI's auto insurance.

Berea College Knox Promise Neighborhood (Knox County, Kentucky)

JOB DESCRIPTION: ACADEMIC INTERVENTIONIST

The Academic Interventionist (AI), a key full-time position in the Knox Promise Neighborhood Initiative, is located in several schools in Knox County. The Academic Interventionist will provide direct services and interventions to a caseload of students by meeting with them, individually and collectively, to develop a plan for academic success and to provide academic interventions and referrals to services necessary to ensure success. Services will vary depending upon the level of the students. The AI will work with students for as long and as intensively as needed, to assist each student in achieving academically, becoming college and career ready, and adjusting to postsecondary education or training programs. The AI will monitor individual student data using an early warning system to ensure that interventions occur as soon as signs of concern arise (attendance issues, grades, discipline referrals, etc.). Additional responsibilities include providing content tutoring in and out of school and serving as a school and community resource on college access and awareness.

PRIMARY DUTIES AND RESPONSIBILITIES

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Regular and predictable attendance is essential. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- In collaboration with Promise Neighborhood program staff and building-level administrators and teachers, coordinate and deliver services to an identified caseload of students at each grade level who are below benchmark.
- Meet with students, individually and collectively, to provide academic interventions and referrals to services necessary for success.
- Help students develop financial literacy, time management and organizational skills.
- Work with students on their individual learning plans, career awareness, and career planning.
- Maintain accurate records and data and submit reports regularly.
- Engage families of caseload students through regular communication and home visits.
- Communicate the Promise Neighborhood mission and vision to community, parents, staff, and students.
- Participate in school-level Promise Neighborhood Partnership council.

Other roles/duties will be assigned as necessary to assist the College in the attainment of the goals set forth and the enhancement of a positive, respectful learning environment for all staff, faculty and students.

MINIMUM QUALIFICATIONS

Education required to ensure success in this position:

- Bachelor's degree in education or related field

Experience required to ensure success in this position:

- Knowledge of college access and success best practices
- Classroom/group management and team building skills
- Understanding of curriculum development and interdisciplinary teaching methodologies
- Understanding of service learning

Special skills, knowledge and abilities:

- Computer competency, including data entry, word processing, familiarity with Excel or other spreadsheets, experience with Microsoft Office products

License, certification, or registration necessary:

- Valid driver's license
- Background check, including social media check

Physical requirements:

- Occasionally lift and carry 25 pounds
- Occasionally travel for meetings

ENVIRONMENTAL CONDITIONS

- Work in Knox County schools
- School and office setting
- Extensive computer use

Ability to operate the following vehicles or equipment:

- Standard office equipment, including computer, telephone, fax machine
- Motor vehicle

Chula Vista Promise Neighborhood and San Diego Promise Neighborhood (California)

JOB DESCRIPTION: ACADEMIC ADVOCATE

- Follows a cohort of 25–50 students, based on program design, from as early as 7th grade through middle school, high school, and into postsecondary institutions and provides mentorship, resources, and support to achieve college and career aspirations.
- Supports school staff in providing information regarding academic planning, postsecondary education opportunities, college entrance requirements, scholarship and financial aid resources.
- Supports the coordination and administration of standardized preparatory exams.
- Conducts quarterly parent/student meetings to assess needs and review progress in Promise Neighborhood program.
- Conducts monthly check-ins with student cohort.
- Assists students with any academic/personal challenges by enrolling them in appropriate after-school courses, providing them with tutors, and/or connecting them with the appropriate resources.
- In alignment with school staff, responds to inquiries regarding educational programs.
- Plans awards, incentives, workshops, and special programs.
- Stays up to date and in alignment with school staff regarding college/postsecondary education qualifications.
- Assists with the coordination of a variety of available resources such as the Regional Occupational Program (ROP), vocational education classes, community colleges, adult learning centers, and college and career planning center.
- Works closely with counseling staff to make community referrals.
- Promotes positive school, parent, and community relationships.
- Monitors attendance and progress of cohort on a regular basis.
- Provides support and education to parents regarding educational and extracurricular development if/when necessary.
- Maintains program documentation as required by San Diego Promise Neighborhood and its funding sources.
- Participates in all required orientations, trainings, staff meetings, and monthly collaborative meetings.
- Adheres to all San Diego Promise Neighborhood personnel policies and procedures.
- Performs other duties as assigned and required by the program coordinator.

Deer Creek Promise Neighborhood and Indianola Promise Community (Mississippi)

JOB DESCRIPTION: LINKS ASSOCIATE

LINKS Associate reports to Project Director for LINKS. This position is responsible for hands-on programmatic or administrative functions. This individual will follow directions and guidelines to accomplish assigned duties and will contribute to the team effort by accomplishing related results, as needed. This position requires familiarity with rules and regulations relevant to the specific duties and provides support and a positive working relationship to Delta Health Alliance (DHA) staff and partners. Confidentiality will be maintained, and data collection and reporting will be provided as required. This person will communicate with supervisors and peers to keep all apprised of issues, program updates, and status of assignments.

The LINKS Associate will guide families and individuals through the program's pipeline. The Associate will enroll families identified by the research team using school data and refer them to programs that meet their needs. The Associate will work with the schools to support students' individual learning paths (ILP) and engage all participants or their families in the development of customized goals, developing long-term plans that identify specific steps necessary to achieve each student's objectives. A key component of this position will be to assist in fostering and maintaining positive working relationships with parents, early education partners, the school districts, DHA partners, health care organizations, and community, state, and federal agencies. This person will also advise the program leadership on the progress and status of this project. The LINKS Associate is expected to have an understanding and respect for the culture of the community's residents and experience working in a school setting.

RESPONSIBILITIES

- Meet with students, parents, and interventionist teams to provide assistance with ILP surrounding, but not limited to, academics (behaviors: identifying feelings, peer socialization, bullying, anger management, conflict resolution skills, self-esteem, decision making, truancy, substance abuse, stress and grief).
- Work with school and/or child care and Head Start staff to assess high-risk situations and make immediate recommendations and referrals in efforts to ensure child safety and/or reduce/eliminate risk factors.
- Work with students and their families to develop strategies (including referrals to outside agencies) for addressing the emotional and basic needs of the students and their families.

- Serve as liaison between student, home, school, and community resources, such as family service agencies, mental health clinics, courts, protective services, doctors, and clergy members.
- Conduct home, agency, and community-based visits.
- Work closely with key school staff at assigned schools, including principals, special education department, counselors, Positive Behavioral Intervention and Supports (PBIS) specialist, and Intervention Specialists, as well as DHA management and staff.
- Provide feedback to parents, teachers, and administrators on how to best support students.
- Work closely with project managers, research assistant/community liaison, evaluator, and Efforts to Outcomes (ETO) Administrator on assessments and data collection.
- Assist project members with troubleshooting, data gathering, and implementation issues.
- As directed by the Project Director, represent DHA in collaborative community-wide activities while developing positive working relationships with local, state and federal agencies.
- All other duties as assigned.

COMPETENCIES

- Communication: Writes and speaks clearly in all situations; listens and requests clarification when needed; responds well to questions; able to interpret oral and written information, such as safety rules, operating and maintenance instructions, and procedure manuals; communications are non-confrontational.
- Computer skills: Experience with and knowledge of computer operation; knowledge of Microsoft Office suite (Word, Excel, PowerPoint, Outlook, etc.) and database applications.
- Dependability: Follows instructions; responds to management direction; arrives at meetings and appointments on time; completes tasks on time or notifies appropriate person with an alternate plan; keeps commitments.
- Interpersonal skills: Focuses on solving conflict, not blaming; maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things; shows respect and sensitivity for cultural differences.
- Organizational skills: Balances team and individual responsibilities; gives and welcomes feedback; contributes to building a positive team spirit; follows policies and procedures; supports organization's goals, values, and objectives.
- Professionalism: Manages difficult or emotional interactions with employees and partners; responds promptly to customer/employee needs; solicits feedback to improve work; responds to requests for service and assistance; reacts well under pressure; accepts responsibility for

own actions; follows through on commitments; able to deal with frequent change, delays, or unexpected events.

PERFORMANCE OBJECTIVES

1. Accountable for responsibilities, completes tasks in a timely manner, works independently.
2. Plans, organizes, and prioritizes workload.
3. Communicates effectively with supervisor, peers, and community.
4. Willingness to take on additional responsibilities.
5. Reliability (attendance, punctuality, meeting deadlines)

Performance Plan will be tailored to the individual position and may include additional Performance Objectives, as well as the above Competencies.

MINIMUM REQUIREMENTS

- Bachelor's degree preferred but not required in education, social work, public administration, health care administration, or a related field.
- Two years or more experience, preferably in a school or home-based setting.
- Strong interpersonal skills, conflict resolution skills/crisis management background working with families with social/emotional challenges preferred.
- Must have a valid Mississippi driver's license and proof of insurance.

Hayward Promise Neighborhoods (California)

JOB DESCRIPTION: STUDENT SUCCESS COACH

The Hayward Promise Neighborhoods' Student Success Coach (SSC) based at Cal State University-East Bay (CSUEB) will monitor the academic performance and the social and emotional well-being of CSUEB students on their caseload to ensure their persistence through a college experience that will lead to graduation and a diploma. They will collaborate with counselors, advisers, faculty, and families (as appropriate) to help students who are referred to them connect, reconnect, and/or re-engage with school and the educational environment. The SSC will assist, support, and facilitate the following based on the individual needs of each student.

- Develop and strengthen the relationship between/among CSUEB faculty, family, coaches, and service providers to ensure supports are aligned and effective.
- Assist student and family to navigate various systems of support both on campus and off campus, and provide the connections to allow seamless transitions across services.
- Attend meetings for students receiving services for individuals with disabilities, and support the communication and implementation of any recommended accommodations.
- Act as a mediator for students experiencing difficult barriers to their educational or social emotional success, and be a resource to provide avenues of appropriate support.
- Expose and link students to career exploration activities, and assist students in accessing support for college and financial aid applications.
- Connect and facilitate access for students to tutors and programs that support academic achievement.
- Engage students in opportunities that guide and motivate them to complete the academic requirements to graduate and receive a diploma.

The following results will reflect the efficacy and impact of the work of the SSC and are a part of the HPNs Data Management Plan for the CSUEB Student Success Coach.

- Monitor attendance rate of students on caseload.
- Check in with students on caseload on a regular basis, with a frequency determined by needs of the student.
- Support on-time completion of each level of study and coursework, and facilitate appropriate process if student is unable to complete coursework.
- Support an increased graduation rate from CSUEB.

Mission Promise Neighborhood (San Francisco)

ABOUT THE MISSION ECONOMIC DEVELOPMENT AGENCY AND MISSION PROMISE NEIGHBORHOOD

The Mission Economic Development Agency (MEDA) is a community-based, local economic development organization which, for over 40 years, has engaged individuals and small businesses in community-building strategies. Our mission is to achieve economic justice for San Francisco's low- and moderate-income Latino families through asset development. In December 2012, MEDA was one of seven agencies selected for funding by the US Department of Education, Office of Innovation & Improvement to receive a Promise Neighborhoods Program Implementation Grant. This federal program sought to improve academic achievement and family economic success for San Francisco's Mission District families and students and targeted four low-performing schools. In 2018, Mission Promise Neighborhood (MPN) received a two-year extension grant to continue work and scale to an additional four schools. MPN is a collaborative, community-based program led by MEDA with 15 funded partners and supporting partners, including San Francisco Unified School District (SFUSD), the Office of San Francisco Mayor London Breed, Stanford University's John W. Gardner Center for Youth and their communities, and various city agencies and community-based organizations.

Vision

The Mission Promise Neighborhood builds a future where every child excels and every family succeeds. Students enter school ready for success and graduate from high school prepared for college and careers. The Mission District thrives as a healthy and safe community that provides families and their children the opportunity to prosper economically and to call San Francisco their permanent home.

Mission

The Mission Promise Neighborhood links family economic security with student academic achievement. It creates a comprehensive, integrated framework of evidence-based services that respond to urgent needs and build on the foundation of student, family, community, and school strengths and assets. Together, parents, neighbors, and partner organizations work hand in hand, guaranteeing that all Mission children, youth, and their families achieve academic excellence and economic self-sufficiency.

JOB DESCRIPTION: FAMILY SUCCESS COACH

The Family Success Coach (FSC) serves as the central component of the MPN service delivery system. Family Success Coaches create the direct connection between students and families at school sites and the vast array of programs and resources that compose our continuum of services available for the Community. Family Success Coaches identify service gaps and build their network in San Francisco to

ensure the community has access. The FSC will be a MEDA employee but will be assigned to work at a school site four days a week and one day at MEDA; during school holidays or closings, FSCs are expected to be at MEDA. The FSC will have an assigned desk space at MEDA and will be expected to participate in all MEDA staff meetings, functions, and trainings.

DUTIES AND RESPONSIBILITIES

Coaching

- Provide one-on-one consultations to families and their children to assess their needs, and help them develop and follow through with action plans that will help them meet academic, financial, and other family and/or personal goals.
- Screen families for services, and work with the families to apply for and receive the benefits they qualify for.
- Ensure that families understand and access the full continuum of services associated with the Mission Promise Neighborhood.
- Work with families to develop a transition plan to ensure that their children successfully transition between preschool and kindergarten, elementary to middle school, middle to high school, and high school to college.
- Address barriers to obtain academic success (such as belief, knowledge, and motivation) and help create a college-going culture.
- Provide excellent client service in a culturally and linguistically appropriate way that empowers and supports each community member.
- Inspire families to become advocates for system change to benefit the Mission community.

Partner Collaboration and Service Coordination

- Work within a team at assigned school site to develop and implement MPN strategies and services.
- Develop an expert understanding of social services in the Mission District and in San Francisco, and coordinate directly with MPN partners and school-site staff to ensure that families are aware of and access services they need.
- Together with MPN partners, create a seamless transition and referral system for students and their families along the MPN pipeline of services.
- Ensure that each family is accessing services they need and that barriers to service are removed by advocating for change.
- Identify and establish relationships with new service providers that offer services needed by families.

Data Collection and Tracking

- Collect, monitor, track, and maintain all data on families and students served, including demographic, family finance, public benefits, and referrals, and identify additional supportive and/or more intensive services where needed.
- Collect, monitor, and track data on student and/or family's progress toward their goals in a centralized and shared database. Ensure in a timely fashion the collection, entry, quality, and security of client data.
- Analyze data collected to identify trends and stories, and provide feedback on improvements to data collection.

Outreach

- Conduct outreach to inform community members about MPN intent, goals, and services.
- Participate in and present at community events and meetings, host information sessions, and distribute marketing and informational material to target audiences.

QUALIFICATIONS

- BA degree preferred (major in social work, sociology, education, ethnic studies, or related field).
- Applicants may substitute required education with a minimum of 2–3 years of experience in direct service, provider in a school, community-based organization, or public agency.
- Bilingual Spanish-English fluency; must be able to speak and write fluently in Spanish.

KNOWLEDGE, SKILLS, AND ABILITIES

- Knowledge of the Mission District community, SFUSD, and social service providers is preferred.
- Experience working with immigrant, economically disadvantaged, and diverse populations is required.
- Familiarity with community organizing and empowerment methodologies is highly desirable.
- Ability to provide excellent customer service, keep families engaged, and represent MPN in public.
- Strong commitment to the expectation that children growing up in MPN will attend and graduate from college.
- Ability to take initiative, identify and solve problems, be accountable, and do whatever it takes to ensure families meet their goals.
- Tolerance for changes and ability to work in a fast-paced environment.
- Ability to collaborate and build strong and trusting relationships with all MPN partners (CBOs, schools, public agencies) is required.
- Skilled in using data systems and entering and tracking client data accurately and in a timely manner.

Promise Heights (Baltimore)

JOB DESCRIPTION: PROMISECORPS MEMBER

Full-Time AmeriCorps Members will work in pairs under our five Promise Heights Community School Directors and in partnership with Baltimore City Public School teachers to conduct individual assessments on chronically absent students. Students will be provided with tiered services (universal, targeted, and intensive). PromiseCorps will make appropriate referrals, follow up on and monitor referrals, and enter data in our management information system. PromiseCorps will work with Community School Directors to develop and manage high-quality partnerships to support the school community, including the creation of a cadre of volunteer tutors from area undergraduate and graduate schools. PromiseCorps will be a critical part of a school-based team working together to support student success and family stability. PromiseCorps is a program supported by AmeriCorps and, as such, is considered national service and not employment.

Promise Heights is an initiative within the University of Maryland School of Social Work in Baltimore City. It is a collaboration between community-based organizations and five public PK–12 schools working with children and families living in high-poverty neighborhoods in West Baltimore to improve educational outcomes to ensure youth graduate from high school ready for college and career. Promise Heights employs licensed social workers as Community School Directors to assist schools in providing supportive services for students and families through whole-school strategies and individual referrals. The initiative will focus on reducing chronic absenteeism (missing 20 or more days a year) and improving school climate (behavior, relationships, and physical environment) to reduce barriers to academic success.

PROGRAM BENEFITS

Education award (\$6,095), training, living allowance (\$20,000), health coverage (if needed), child care subsidy (if needed), membership to the Y of Central Maryland, and application fee waived for University of Maryland School of Social Work (for interested applicants).

PRIMARY RESPONSIBILITIES

PromiseCorps will build the capacity of schools to support students and families through the following duties:

- Work with Community School Directors and teachers to conduct individual student assessments for those at risk to be chronically absent.
- Develop an individual plan of action to support student achievement.
- Link students to support services, and encourage them to reach their achievement goals.

- Monitor student performance in programs and services.
- Help families support student success by fostering a home environment that encourages student achievement.
- Develop and track the student success plan in the management information system.
- Maintain and update all contacts, referrals, case management notes, and outcomes.

QUALIFICATIONS

Education: Bachelor's degree is strongly preferred.

KNOWLEDGE, SKILLS, AND ABILITIES

- Ability to learn and grow through a professional development plan process and succeed within a results-oriented culture.
- A devotion and ability to build close relationships with scholars and their families and to motivate them through positive interviewing, feedback, and reinforcement.
- Experience and proficiency with technology.
- Knowledge of or willingness to learn about the cultural and internal barriers that may exist for low-income families to raising college-ready children.
- Strong commitment to belief and expectation that children growing up in West Baltimore can succeed academically.
- A passion for addressing issues of poverty, equity, and access.
- Highly motivated and innovative.

TERMS

Permits attendance at school during off-hours. Permits working at another job during off-hours. Must have transportation (public or private) to school site.

SERVICE AREAS

- Education, community outreach, children/youth

SKILLS

Teamwork, general skills, writing/editing, leadership, community organization, fundraising/grant writing, communications, youth development, social services, public health, education

Acknowledgments

This research was funded by the US Department of Education. We are grateful to them and to all our funders, who make it possible for Urban to advance its mission.

The views expressed are those of the authors and should not be attributed to the Urban Institute, its trustees, or its funders. Funders do not determine research findings or the insights and recommendations of Urban experts. Further information on the Urban Institute’s funding principles is available at urban.org/fundingprinciples.

The authors thank Albina-Rockwood Promise Neighborhood Initiative, Berea College Knox Promise Neighborhood, Chula Vista Promise Neighborhood and San Diego Promise Neighborhood, Deer Creek Promise Neighborhood and Indianola Promise Community, Hayward Promise Neighborhoods, Mission Promise Neighborhood, and Promise Heights for sharing their case manager job descriptions. For more information on this project, see Mica O’Brien and Sarah Gillespie, “[Advancing Results through Case Managers: A Promise Neighborhoods Case Study](#).”



500 L’Enfant Plaza SW
Washington, DC 20024

www.urban.org

ABOUT THE URBAN INSTITUTE

The nonprofit Urban Institute is a leading research organization dedicated to developing evidence-based insights that improve people’s lives and strengthen communities. For 50 years, Urban has been the trusted source for rigorous analysis of complex social and economic issues; strategic advice to policymakers, philanthropists, and practitioners; and new, promising ideas that expand opportunities for all. Our work inspires effective decisions that advance fairness and enhance the well-being of people and places.

Copyright © August 2020. Urban Institute. Permission is granted for reproduction of this file, with attribution to the Urban Institute.