



Position	Financial Stability Case Manager	FLSA:	Non – exempt Temporary
Program/Department	Financial Stability Services	FTE	Full time
Supervisor	Financial Stability Services Coordinator	Salary & Classification:	
Location	Santa Cruz and Monterey Counties	\$24-28 per hour	

ABOUT CATHOLIC CHARITIES:

Catholic Charities of the Diocese of Monterey is a member agency of Catholic Charities USA, the largest network of social service provider in the U.S with 168 agencies nationwide and 12 in the State of California. Catholic Charities Diocese of Monterey serves the counties of Santa Cruz, Monterey, San Benito, and San Luis Obispo. Catholic Charities promotes equal opportunity in all employment decisions regardless of race, national origin, sex, marital status, physical /mental disability, age, or other bases protected by federal, state, or local law.

Programs:

The local programs are: Financial Stability Services, Nutrition Education & Outreach, Tattoo Removal Services, and Immigration Legal Services.

Mission:

Our Mission is to provide service to people in need, to advocate for social justice, and to call other people of good will to do the same.

Service • Advocacy • Convening

Vision: Our vision is a thriving community where individuals, regardless of their background or circumstances have the opportunity to reach their potential and contribute to society.

Values: We will achieve this through our commitment to advocacy and by providing compassionate, inclusive and impactful services while building bridges of hope, mercy and justice to meet the needs of our communities.

POSITION SUMMARY:

Under the direction of the Financial Stability Coordinator and the Director of Financial Stability Services, this position provides client-centered support to individuals and families through case management, financial and career coaching, and crisis intervention. Key responsibilities include assessing client needs, developing individualized stability goals, coordinating wraparound services, facilitating access to public and private benefits, and administering direct financial assistance. The Financial Stability Case Manager also leads workshops on financial literacy and career development, participates in community outreach, and maintains accurate documentation in compliance with regulatory standards. The role collaborates closely with internal teams and community partners to ensure comprehensive, holistic support for clients. **This is a temporary, time-limited position, with an anticipated end date of April 30, 2026,** and does not imply or guarantee continued employment beyond that date.

FUNDAMENTAL RESPONSIBILITIES:

Promote the mission of Catholic Charities through a commitment to its core values of compassion, service, justice, respect, integrity, teamwork and excellence.

ESSENTIAL DUTIES & RESPONSIBILITIES:

1. Client Services & Case Management

- Conduct comprehensive client assessments to determine needs and verify eligibility of services.
- Provide individualized case management support, including:
 - Assisting clients in setting and pursuing personalized stability goals.
 - Provide financial and career coaching
 - Following up regularly to support progress and goal achievement.
 - Collaborate with internal programs to provide wrap around care
 - Provide crisis intervention to individuals and families facing emergencies around food, shelter, medical, re-construction and other needs as presented by client
 - Provide direct financial aid.
 - Make appropriate referrals to federal, state and local resources and programs
 - Assist clients in applying for and receiving public and private benefits
 - Advocate and interact with other service providers on behalf of participants

2. Group Support & Outreach

- Facilitate educational workshops and group support on financial literacy and career development.
- Participate in outreach events to promote program engagement.

3. Administrative & Compliance Responsibilities

- Maintain accurate and up-to-date client records in designated database systems.
- Ensure compliance with government regulations and uphold strict confidentiality standards.
- Present case files to Case Management Coordinator for review
- Submit monthly reports to the Program Coordinator or Program Director as requested.
- Attend staff meetings and participate in required trainings.
- Assist the Program Coordinator and Program Director with program operations and contribute to process improvement initiatives.

4. Other Duties as assigned by the Director of Financial Stability Services

QUALIFICATIONS, EXPERIENCE, AND KNOWLEDGE:

- B.A degree in social work, public health, health and human services or related field from an accredited educational institution, or a combination of equivalent education and work experience.
- Minimum of 2 years of case management and disaster response experience.
- Knowledge of best practices for financial and career coaching, disaster recovery, strength-based case management, and restorative justice practices.
- Bilingual and Bi-literate in English and Spanish (highly preferred)
- Excellent written, oral, and electronic communication skills
- General knowledge of trauma informed care.
- Knowledge of local, state, and federal assistance programs and navigation of these benefits.
- Excellent computer skills including Microsoft office (Word, Excel, Outlook, PowerPoint) and ETO (Bonterra's Case Management Software)
- Ability to communicate professionally with compassion and empathy. Demonstrate welcoming and friendly demeanor; appreciative and respectful of all cultures and beliefs.
- Strong organizational, time management, and teamwork skills
- Ability to work well independently and as part of a team
- Ability to attend occasional evenings and weekend events.
- Ability to work in fast pace environment

- Flexibility and willingness to take on new tasks
- Knowledge of the needs of the local community and resources available
- Ability to travel through our service area to meet with clients.
- Knowledge of the Principles of Catholic Social Teachings and the ability to link them to practical actions

LICENSE, CERTIFICATIONS, REGISTRATIONS:

Must provide a Valid California Driver's License, transportation and current auto insurance.

OTHER REQUIREMENTS:

- Clearance of fingerprint background check is required
- Ability to stand and be active for 2-3 hours at a time
- Occasionally lift or move up to 25+ lbs
- Willing to attend agency outreach with 24 hours of notice.
- The person holding this position is considered a Mandated Reporter under the California Child Abuse and Neglect Reporting Act and is legally required to report any suspicion of abuse or neglect to the relevant authorities.

WORKING CONDITIONS:

- Comfortable office environment
- Some travel to other locations for meetings, trainings, etc.
- Under the Rehabilitation Act of 1973, Catholic Charities Diocese of Monterey must provide reasonable accommodations when an employee with a disability needs an accommodation to perform the essential job duties or to gain access to the workplace.

SALARY AND CLASSIFICATION:

This is an exempt position with a full-range of employee benefits. Salary commensurate to experience. The salary range is \$24-28 per hour, commensurate on experience.

This position description intends to describe the general nature and level of work being performed by people assigned to this job. It is not intended to include all duties and responsibilities. The order in which duties and responsibilities are listed is not significant. Because of a need to remain responsive to the needs of our clients and our Agency's operations, responsibilities may be modified at any time.