

JOB DESCRIPTION PERSONAL AGENT



Position Summary

The mission of Independence Northwest is to support people with developmental disabilities to access resources necessary to ensure equality, respect, independence and complete ownership over their lives. The principles of self-determination are at the heart of our approach; we firmly believe that freedom, authority, autonomy, responsibility and confirmation are key aspects to the success of anyone and everyone.

The Personal Agent (PA) is responsible for supporting up to 45 individuals with developmental disabilities with achieving independence in their daily lives. The primary role of the PA is ensuring a collaborative process of assessment, planning, facilitation and advocacy for options and services to meet the Customer's health, safety and independence needs; the process takes root through open and safe communication and brokering access to available resources to promote quality cost-effective outcomes.

The PA is the primary contact person whose purpose is to assist the Customer and his/her family with navigating and understanding the often confusing and sometimes challenging road to accessing quality supports. The PA is expected to fill multiple roles including that of Communicator, Resource, Advocate, Facilitator and Custodian of Public Funds.

This position reports to the Assistant Director.

Key Job Responsibilities

- Interviews eligible customers to determine needs, provide crisis counseling when appropriate and develop an annual plan of services for the individual
- Makes referrals to outside agencies, describes agency and financial options to Customers and/or families, and guides Customer through procedures
- Develops full financial plan and stays within established budgetary constraints
- Secures information such as medical, psychological and social factors contributing to Customer's situation and evaluates these and Customer's capacities
- Visits to Customer/family homes and investigates and resolves and any all discrepancies in services being provided in relation to services being billed
- Arranges for a variety of goods and services using both natural resources and where natural supports are unavailable, promotes access to paid resources using Support Services funds
- Facilitates the development and expansion of community resources through partnership with community organizations

- Develops and manage timely submission of quarterly and annual quality reviews, including financial statement of Support Services funds being accessed by the Customer
- Prepares reports and provides statistical information as required
- Reviews service plans and performs follow-up to determine quantity and quality of service provided Customer
- Accesses and records Customer and community resource information
- Secures supplementary information such as employment, medical records or school reports as applicable
- Provides support consultation for up to 45 individuals, maintains regular contact with individuals and families, monitors progress of the service plan, visits the individual and/or family home when appropriate
- Maintains records of evaluations, service plans, referrals, service provisions and follow-up reports for each individual
- Records all interaction with Customers or on Customer's behalf by way of case/progress notes
- Participates in staff meetings and training programs

Supervisory Responsibilities

This job has no supervisory responsibilities.

Competencies

To perform the job successfully, the individual must demonstrate the following competencies:

Analytical – Synthesizes complex or diverse information; collects and researches data; uses intuition and experience to complement data; designs workflows and procedures

Design – Generates creative solutions; translates concepts and information into images, when necessary; uses feedback to modify designs; applies design principles; demonstrates attention to detail

Problem-Solving – Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternate solutions, where necessary; works well in group problem-solving situations; uses reason even in instances where situations are emotionally charged or emotionally challenging

Project Management – Develops project plans; coordinates projects; communicates changes in progress; completes projects on time and on budget; manages project team activities, where applicable

Technical Skills – Assesses own strengths and weaknesses; pursues training and development opportunities; strives to continuously build knowledge and skills; shares expertise with others

Customer Service – Manages difficult or emotional Customer situations; responds promptly to Customer needs; solicits customer feedback to improve services; responds to requests for service and assistances; meets 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 is willing to try new things

Oral Communication – Speaks clearly and persuasively in positive or negative situations; listens and gets clarification; responds well to questions; demonstrates group presentation skills; participates in meetings

Written Communication – Writes clearly and informatively; edits work for spelling and grammar; varies writing style to meet the needs of the reader; present numerical data effectively; able to read and interpret written information

Teamwork – Balances team and individual responsibilities; exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building positive team spirit; puts success of team over personal objectives; supports everyone's efforts to succeed

Visionary Leadership – Displays passion and optimism; inspires respect and trust

Change Management – Develops workable implementation plans; communicates changes effectively; builds commitment and overcomes resistance; prepares and supports those affected by change; monitors transition and evaluates results

Leadership – Exhibits confidence in self and others; inspires and motivates others to perform well; accepts feedback from others

Quality Management – Looks for ways to improve and promote quality; demonstrates accuracy and thoroughness

Cost Consciousness – Works within approved budget; develops and implements cost saving measures; conserves organizational resources

Diversity – Shows respect and sensitivity for cultural differences; educates others on the value of diversity; promotes a harassment-free environment

Ethics – Treats people with respect; keeps commitments; inspires the trust of others; works with integrity; works ethically; upholds organizational values

Organizational Support – Follows policies and procedures; completes administrative tasks correctly and on time; support organization's goals and values

Judgment – Displays a willingness to make decisions; exhibits sound and accurate judgment; supports and explains reasoning for decisions; includes appropriate people in decision-making process; makes timely decisions

Motivation – Sets and achieves challenging goals; demonstrates persistence and overcomes obstacles; measures self against standard of excellence; takes calculated risks to accomplish goals

Planning/Organization – Prioritizes and plans work activities; uses time efficiently; plans for additional resources; sets goals and objectives; organizes or schedules other people and their tasks; develops realistic action plans

Professionalism – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments

Quality – Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality; applies feedback to improve performance; monitors own work to ensure quality

Quantity- Meets productivity standards; completes work in a timely manner; strives to increase productivity; works quickly

Safety and Security – Observes safety and security procedures; determines appropriate action beyond guidelines; reports potentially unsafe conditions; uses equipment and materials properly

Adaptability – Adapts to change in the work environment; manages competing demands; changes approach or method to best fit the situation; able to deal with frequent change, delays or unexpected events

Dependability – Follows instructions; responds to management direction; takes responsibility for own actions; keeps commitments commits to necessary hours of work to reach goals; completes tasks on time or notifies appropriate person with an alternate plan

Initiative – Volunteers readily; undertakes self-development activities; seeks increased responsibilities; takes independent actions and calculated risks; looks for and takes advantage of opportunities; asks for and offers help when needed

Innovation – Displays original thinking and creativity; meets challenges with resourcefulness; generates suggestions for improving work; develops innovative approaches and ideas; present ideas and information in a manner that gets others' attention

QUALIFICATIONS

Education and Experience - The Personal Agent must have a minimum of a bachelor's degree and two (1) year experience in developmental disabilities, social services, mental health or a related field; or five (5) years of experience in the field of developmental disabilities or a social service or mental health field. Experience working in a Self-Directed Supports system strongly desired. The individual must have a demonstrated commitment to customer self-determination and personalized support; possess strong written and verbal communication skills; and proven ability to prioritize, meet deadlines and manage multiple projects in a fast paced environment. Previous experience working in Oregon's Self-Directed Supports environment is highly desired, though not required.

Language Skills – Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures and/or government regulations. Ability to write reports and business correspondence. Ability to effectively present information and respond to questions from groups of managers, Customers, providers and the general public.

Mathematical Skills – Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference and volume. Ability to apply concepts of basic algebra and geometry.

Reasoning Ability – Ability to solve practical problems and deal with a variety of concrete variables in situations, where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram or schedule form.

Computer Skills – To perform this job successfully, an individual should have knowledge of spreadsheet and word processing software (preferably well-versed in Excel and Word and other Office Suite software)

Physical Demands – The physical demands described here are representative of those that must be met by the employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to use hands to finger, handle or feel and talk or hear. The employee is frequently required to sit. The employee is occasionally required to reach with hands and arms. The employee must frequently lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, depth perception and ability to adjust focus.

Work Environment – The work environment characteristics described here are representative of those an employee encounters while performing the essential

functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Driving – The employee must have daily access to reliable transportation and frequent travel will be required. The employee must have a clean driving record and an Oregon Driver’s License.

Working Hours

Typical hours are 9am – 5:30pm, Monday through Friday; 40 hours a week is expected from this position. The position is a salaried position, non-exempt. All overtime must be requested in advance and must be approved by a supervisor. This position reports to the Assistant Director.