

Victoria Wertz

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EXPERIENCE

Tallatoona Community Action Partnership, Inc, Bremen, GA

Energy Assistance Case Manager (11/2020–Current) Temporary Position

Responsible for the intake management of clients participating in the Low Income Home Energy Assistance Program (LIHEAP). Responsibilities include but are not limited to:

- Check and certify completed energy assistance applications to ensure accuracy and quality in accordance with Agency, State, and Federal rules, regulations, policies, and procedures
- Identify incomplete and/or inaccurate applications and resolve issues as necessary
- Maintain standard of promptness for checking and certifying applications
- Make contact with applicants and/or staff to obtain documentation required for completion of applications if necessary
- Verify account status with utility providers/vendors as necessary
- Maintain application counts for processing deadlines
- Research and follow-up on application and payment inquires
- Answer incoming calls, schedule appointments, and communicate document requirements for appointments
- Provide excellent customer service; interact professionally with clients, coworkers, and utility providers
- Perform other duties as requested and assigned

Greenhome Solutions of Georgia, LLC, Cedartown, GA

Office Manager (12/2017–11/2019)

Responsible for the management and administrative functions of the office, as well as assistant to the company owner of a residential energy assessment & improvements, and weatherization services company (~1.3M). Responsibilities included but were not limited to:

- Project and crew coordination, scheduling, Google calendar management, and Google mapping
- Research property tax records to ensure accuracy of property ownership
- Create and manage Beacon Home Energy Advisor Reports
- Manage Georgia Power's Home Energy and Improvements Program's invoices and rebate applications
- Manage GA Power's Energy Assessment & Solutions Program's new client intake & vetting, Phase 2 bids, scheduling, and invoicing
- Manage Tallatoona Weatherization Assistance Program bids, estimates, job scheduling, and invoicing
- Track reimbursement submissions and payments, including coordination with program representatives
- Supervise a staff of one, as well as any temporary help, as needed
- Create and manage production reports
- Develop and maintain hardcopy and electronic files, filing system, and Excel databases
- Correspond with clients, partners, staff, and third-party representatives
- Handle client inquiries and complaints
- Manage Wave accounting
- Create and maintain company policy and procedures manuals, DUNS and SAM registration, website, social media, online presence, continuity of branding, and corporate identity materials
- Manage company employment ads, and assisted in recruiting, interviewing, and onboarding of new hires
- Create and manage company OneDrive, Microsoft 365 accounts, staff Gmail accounts, and shared files
- Research projects; manage correspondence; coordinate travel and itinerary; and schedule appointments for owner
- Reception, mail, and main phone duties
- Manage and order office supplies & maintained office equipment

WFN, Inc., Marietta, Georgia (Cobb County CDBG Program Office)

Program and Environmental Review Specialist / Office Manager (02/2009–10/2016)

Cobb County Housing Rehabilitation & Neighborhood Stabilization (NSP) Programs

Responsible for all administrative functions of a multi-year HUD-funded (~275K annually) Housing Rehabilitation Program and the \$12.5 Million Neighborhood Stabilization Program. Responsibilities included but were not limited to:

- Liaison between program and participants, contractors, inspectors, agents, lenders, and community and industry leaders
- Client intake, vetting, and HUD eligibility verification
- Contractor procurement, including reviewing bids and cost estimates
- Preparing housing rehabilitation contracts, lien documents, and closing documentation
- Project coordination with clients, inspectors, and contractors
- Invoice and Request For Payment processing
- Monitoring scopes of work and change orders to ensure compliance with contract terms
- External/internal auditing of projects
- Electronic and hardcopy filing system, and database maintenance
- Budget management, reconciliation, and financial sources and uses documentation
- Creating HUD Environmental Review Reports for all CDBG Program Office programs, including submission to HEROS

- Manage HUD's IDIS activities and drawdowns for all housing rehab projects, and other programs, as needed
- Contractor monitoring to ensure current insurances and licenses, as well as active Federal SAM and County approval status
- Managing communications, mailings, and ad campaigns via verbal, written, and electronic communications
- Handling client inquiries and complaints
- Creating weekly, monthly, and quarterly statistical and financial reports for County, HUD, and GA DCA reporting
- Creating and maintaining program website and social media relations
- Creating and maintaining department functionality and continuity of branding, as well as Policy and Procedure Manuals
- Maintaining NSP monthly rental reports, as well as monitoring continued grant regulations, notices, and closeout guidelines
- Maintaining staff calendars and scheduling of meetings, appointments, and property closings
- Reception, mail and main switchboard duties
- Office equipment maintenance, such as PC's, phone system, printers, fax machine, copiers
- Notary Public services, as needed

CryoLife, Inc., Kennesaw, Georgia – Contract Position

Pathology Admin Coordinator & Medical Transcriptionist/Donor Quality Service Admin Coord (02/2008-09/2008)

Responsible for the department's administrative and transcription duties, reporting to the Medical Director, Associate Medical Director and Pathologist. Responsibilities included but were not limited to:

- Transcription of laboratory and pathology dictation into medical database
- Produced, assembled, and distributed completed approved reports
- Transcribed and created miscellaneous reports and/or documents for Doctors
- Maintained accurate report library, as well as priority report logs
- Coordinated travel arrangements
- Manage medical article & paper requests, including placing orders, tracking receipt, & delivering documents to requestors
- Managed incoming donor chart documentation initialization and workflow for Donor Quality Service Department
- Processed serology and culture results into donor database
- Activity reporting of incoming documentation and distribution to analysts

Child Care Connection of Sarasota / Sarasota County Early Learning Coalition, Sarasota, Florida

Reimbursement, Reconciliation & Provider Relations Department Coordinator (12/2003–09/2006)

Responsible for all administrative functions and coordination of the day-to-day operations of the state-funded Early Learning, School Readiness, and Voluntary Pre-Kindergarten for Programs for Sarasota County. Responsibilities included but were not limited to:

- Supervised a staff of one, as well as any temporary help, as needed
- Established department functionality at program startup, including creating all report formats, departmental guidelines and procedures, departmental documents, databases for data tracking and analysis, and ad hoc databases
- Produced all budget, financial, analysis, forecasting, utilization, expenditure, invoicing, and ad hoc reports for State, County, and Community Early Learning, School Readiness, and Voluntary Pre-Kindergarten funding programs
- Liaison between organization and provider clients via verbal, written, and electronic communications
- Analyzed funding utilization to strategize future allocation plan, ensuring state and local requirements were met
- Processed School Readiness reimbursements, ensuring accurate and timely provider payments
- Coordinated Voluntary Pre-Kindergarten Program's monthly prepayment and reconciliation processes
- Coordinated multiple monthly provider client communications and mailings
- Created and managed provider perpetual and reimbursement record system and database, ensuring accuracy and integrity of documentation required by state and local regulations
- Managed the United Way of Sarasota County's Success By 6 Hardship Scholarship Program

Verizon Wireless/Primeco Personal Communications, Bradenton, Florida

Sales Representative (12/1997–03/2003) Position held while attending college

SKILLS

MS Office – MS 365, Excel, Word, PowerPoint, Publisher, Outlook, OneDrive, OneNote, Access, InfoPath, Windows Explorer; Google – Drive, Docs, Sheets, Gmail, Calendar, Keep, Slides, Forms, Maps/Earth; Accounting: Wave; Browsers – Chrome, Firefox, IE; OpenOffice; Evernote; Box; DropBox; Adobe Acrobat Pro; CutePDF; PDFescape; Graphic Design – Photoshop, Illustrator, Pixlr, Vectr, Inkscape, Flexi; Web Design – WordPress, Joomla, HTML, CSS, PHP, cPanel, phpMyAdmin; Social Media – Facebook, Twitter

EDUCATION

Bachelor of Arts - Illustration

Ringling College of Art & Design,
Sarasota, FL - 2002