

INTAKE COORDINATOR

GENERAL PURPOSE OF THE POSITION:

The role of the Intake Coordinator is to provide front-line customer service to individuals seeking ALICE Assistance. The Intake Coordinator will focus on building a rapport with the general public, service providers and partners. Working with the Financial Navigator / Coach they will promote and schedule tax preparation appointments and individualized financial coaching sessions. The Intake Coordinator will provide individualized intake and screening for the ALICE Assistance funds, make assistance recommendations to the appropriate CI Team, and facilitate warm referrals to community resources as appropriate.

FLSA STATUS: NON-EXEMPT (F/T)

WORK SCHEDULE: Core Office Hours of Monday-Friday, 8:00 a.m. to 4:30 p.m.

Must be able to work a flexible schedule with the possibility of early evening, and weekend work.

REPORTS TO: Financial Navigator

PRINCIPAL DUTIES AND RESPONSIBILITIES:

- ALICE Assistance Fund: Under the supervision of the Financial Navigator, ensure the efficient intake, screening, tracking, referral and follow-up of eligible individuals and families for the ALICE Assistance Fund.
- Resource referrals: Identify and refer participants to other resources and services needed to achieve their financial stability goal. Identify, cultivate, and maintain relationship with key community partners.
- Scheduling: promote, register, track and report sign-ups for assigned tax preparation sites, financial coaching sessions, and financial education classes/workshops.
- Reception duties: provide excellent customer service for the RUW front desk area. Managing telephone calls, emails and walk-ins for individuals seeking assistance, program participants, donors, volunteers, and general visitors.
- Data collection and evaluation: Collect and verify all required data from callers, visitors and program participants throughout the program. Assist in program reports preparation
- General program support: Provide support, as needed, to other core programs including cross training in other service areas. Assists with special projects as assigned and other tasks deemed necessary to achieve overall goals and to operate a successful program.
- Policy and Guidelines: Adheres to all guidelines related to confidentiality and excellent customer service.
- Maintain a flexible work schedule as needed.

EDUCATIONAL PREREQUISITES:

- Bachelor's Degree preferred, but not required
- Social services expertise and experience: the applicant should have a background in social services or other field related to human services. The applicant should have experience working with low-moderate-income households in one or more of the following areas: financial assistance, healthcare, housing, or other field related to human services.



QUALIFICATION/REQUIREMENTS:

- Excellent communication and organizational skills
- Proven problem-solving skills
- Ability to interact effectively and confidently with individuals at all social and economic levels
- Ability to present information and directions in an easy to understand format – verbally and in writing
- Ability to work with little supervision
- Flexible, adaptive and positive in a constantly changing environment
- Detail-oriented, with a willingness to learn new skills and techniques to promote quality, efficiency and successful customer outcomes
- Ability to sense when clients are overwhelmed and to provide assistance / referrals in manageable steps
- Proficient with Microsoft Office and web-based applications
- Must have the use of a reliable vehicle for transportation to outside meetings

SKILL AND EXPERIENCE PREREQUISITES:

- Between 1 to 3 years of prior relevant work experience.
- Experience working with individuals in crisis
- Experience working with nonprofits
- Excellent interpersonal, written and verbal communication skills.
- Organizational skills, with the ability to handle multi-tasking.
- Proficiency in English and Spanish is a plus.

PHYSICAL & MENTAL DEMANDS:

Requires sitting for long periods of time at a computer and keyboarding for up to 7 hours a day. Requires the ability to multi-task between program duties and various community site locations throughout PD16. Typically lifts program files, supplies, computer equipment and storage boxes of 25-50 lbs.

PROFESSIONAL EXPECTATIONS:

- Maintains confidentiality of client records
- Work as a team member with staff and volunteers
- Complies fully with the corporation's Code of Ethics
- Completes all assigned responsibilities in a timely manner

The statements made herein are intended to describe the nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

EMPLOYEE SIGNATURE

DATE