

# Urban League of Broward County

## Employment Opportunity

### Job Description

Title: **Intake Specialist**  
Classification: Full Time – 40 hours per week  
Division: Entrepreneurship Center  
Supervisor: Manager as Assigned  
Revision Date: September 2022

### Position Summary:

The **Intake Specialist** will play a key role in supporting the organization's programs to ensure that we are meeting our programmatic goals and outcomes, maintain compliance and actively engage community. The Intake Specialist supports the supervisor and the team/department.

### Responsibilities:

- Responds to incoming calls and requests and educates callers regarding the service offerings
- Determines the best course of action for the entrepreneur, small business.
- Conducts small business intake and assessment
- Collects client intake forms and ensures all required client and program data is recorded in the client management system Outcome Tracker and Downhome Loan Manager
- Collects and tracks all client participation goals and Return on Investment Data for outcome and reporting purposes
- Assists in the disbursement and collection of industry and funder surveys
- Checks system contact us page to respond to inquiries
- Ensures that data collection, reporting and filing systems meet organization's reporting needs and complies with all contracts', funders', and audit requirements
- Schedules appointments with EC team or TA provider
- Prepares pipeline report of service requests
- Prepares client files (copy required documentation), loan presentation and workshop materials as needed
- Provides current information to program clients, prepares email communications and scheduling of meeting rooms as needed for appointments
- Provides general administrative support to EC and other duties as assigned.

### Education/Experience

- Associate's Degree required; Bachelor's Degree preferred in the field of business, customer service, social work, education or related human service field or a combination of college education and four years of job related experience.
- Experience in housing, financial literacy, and/or asset building required
- Bilingual preferred in English and Spanish, Creole, etc.
- Must have excellent presentation skills.

- Experience in the area of recruitment preferred.
- Experience working with disadvantaged populations.

### **Qualifications & Skills**

- A minimum of at two years' experience entering client level data into an electronic database.
- Strong and clear verbal and written communicator
- Strong knowledge of MS Office, including Excel, Word, and database skills.
- Resourcefulness and entrepreneurial spirit.
- Familiarity with government programs, philanthropy, and legal documentation is a plus.
- Demonstrated ability to establish and maintain systems for organizing work; well-developed time management skills and ability to meet stringent deadlines and time constraints.
- Mature judgement and demonstrated ability to work with minimal supervision in a fast-paced work environment.
- Demonstrated professionalism, diplomacy, and composure; flexible and able to adapt to a variety of situations.
- Ability to work cross-functionally with multiple business departments and in a team environment, including senior management.
- Performs other duties as assigned.

### **Other**

- Must have a valid Florida driver's license and reliable transportation.
- Must be able to pass a level two criminal background check and drug screening

**Submit Cover Letter and Resume to:**

[hiring@ulbcfl.org](mailto:hiring@ulbcfl.org)

**THE URBAN LEAGUE OF BROWARD COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER**