Position Description

Title: Intake Specialist  
Classification: Nonexempt  
Division/Team: Economic Services/Financial Stability  
Supervisor: Program Coordinator or as Assigned  
Revision Date: March 2021

**Must have customer service and telephone experience**  
**Bilingual Preferred: English and Spanish or Creole**

**Purpose of Position**  
An Intake Specialist is primarily responsible for receiving incoming calls, screening for client eligibility, and scheduling appoints for the team. The Intake Specialist responds to calls from clients and completes pre-assessment eligibility.

**Essential Duties and Job Responsibilities**
- Manages all incoming telephone calls for the Financial Stability team.
- Assess calls for client eligibility and make appropriate referrals.
- Respond to program related calls within 24 hours.
- Schedule appointments for team members.
- Assist in the preparation of orientation and one-on-one-counseling to eligible clients in the programs.
- Prepare client files (copy required documentation).
- Track program related calls on a log.
- Provides current information to program clients.
- Prepare mailings for programs in the department.
- Assist in the development of client files.
- Assist in the monthly report preparation and submission.
- Meets all performance standards and requirements for program contracts/grants or Urban League of Broward County.
- Informs clients and families of support and referral services internal or external.
- Advises immediate supervisor or needs, trends and issues within area of responsibility and recommends activities to address them.
- Actively participates in Urban League of Broward County’s special event committees and projects.
- Serves as a liaison and contact person with other agencies to ensure coordinated and comprehensive delivery of services to clients.
- Performs other duties as assigned.

**Standards for Measuring Performance**
- Excellent oral communication and written skills.
Positive and team-oriented attitude.
Outstanding organizational skills.
Ability to work effectively with persons of all ages and diverse backgrounds, skills and abilities.
Must be able to operate a personal computer using Microsoft Office or similar applications.
Ability to carry out responsibilities with flexibility to adapt to changing needs and goals.
Ability to balance the needs and expectations of multiple constituents.

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.

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

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