



Urban League of Broward County

Job Vacancy Posting

Title: Small Business Intake Specialist
Reports to: Small Business Manager as assigned
Division/Team: Entrepreneurship Center
Revision Date: May 2026

Purpose of Position

The **Small Business Intake Specialist** plays a key role in supporting the organization's programs to ensure that the programmatic goals and outcomes are met, maintain compliance and actively engage community. The position supports the supervisor and the team/department.

CORE DUTIES and RESPONSIBILITIES (Abbreviated):

- 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 contacts page to respond to inquires
- 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 recruitment preferred.
- Experience working with disadvantaged populations.

Qualifications & Skills

- A minimum of 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, 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 Resume and Cover Letter to:
hring@ulbcfl.org

THE URBAN LEAGUE OF BROWARD COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER