

Intake Specialist Job Description

Agency Mission: H.O.P.E. is a nonprofit corporation founded in 2005. Our mission is dedicated to assisting low-income, individuals and families to achieve long term financial and social self-sufficiency. Our programs are designed to be delivered in an integrated manner to give those that we support the maximum ability to obtain the necessary financial skills, means and opportunities to succeed. Currently, our efforts are focused on foreclosure intervention assistance to homeowners struggling with their mortgages and pre-purchase counseling.

Job Description Summary: This is a wide-ranging position, which includes a great deal of client contact, contacting lenders/servicers, and also completing reports on our work.

Reports to: Housing Director

Primary Job Duties:

1. Perform data input of intake packages utilizing the Indisoft Client management system.
2. Perform basic duties, including intake and budget assessments. Assist counselors in faxing documents to servicers/homeowners.
3. Coordinate monthly workshops for pre-purchase education and post-purchase counseling.
4. Assist in maintaining resource and referral network among the community, public, private and governmental agencies
5. Be part of the marketing team that addresses housing services to the local community, non-profit, public and private agencies.
6. Participate in outreach by attending community events, coalition meetings, and presentations (some of which will be during the evening or weekends)
7. Enter client data into tracking system, such as the DHCD Portal.
8. Compile reports as needed and requested.
9. Perform administrative and other tasks as required.

Desirable Qualifications:

1. To be proficient with Indisoft or on line client management systems
2. Highly organized, ready to learn, strong negotiation skills
3. Strong time-management skills
4. Excellent communication and listening skills
5. Able to track data and complete reports
6. Proficient with Microsoft Office (Words, Excel, Publisher and etc)
7. Ability to work independently and as a team.

The above statements are intended to describe the general nature and level of work being performed by the individual(s) assigned to this position. They are not intended to be an exhaustive list of duties, responsibilities, and skills required. Management reserves the right to modify, add, or remove duties and to assign other duties as necessary. In addition, reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of this position.