INTAKE SPECIALIST

Under the direction of the Associate Director of Adult Workforce Development, the Intake Specialist will work closely with department staff, volunteers, and interns to ensure that the Agency and its department complies with grants, contracts, state and federal regulations and standards. The Intake Specialist will be responsible for the coordination of services offered to enrolled participants from the beginning of their enrollment into the program and will help in managing relationships with service providers to improve the quality of referrals to provide superior customers to participants seeking to enroll on the program. The Intake Specialist will work with other department managers and career coaches by providing support in enrolling eligible participants and enrolling them into CalJobs, help developing Individual Employment Plans (IEP) with clients to support their career path, enter and maintain information in CalJobs, ETO and other internal databases for each enrolled client, assist in training participants using various training providers, and will provide follow-up services with clients for a minimum of one year after they have obtained employment. The Intake Specialist will also coordinate with other department managers to develop systems that will generate the highest level of customer service for enrolled participants. She/he will also help run reports for the department and will support the manager of the team to meet his/her goals.

One of the main roles of the Intake Specialist is to support the leadership staff of the department with meeting the goals of the organization that was established in the 5-year strategic plan. The Intake Specialist should spend 50% of her/his time monitoring and maintaining eligibility enrollments, closure, and follow-up to meet WIOA performance measures. This includes overseeing implementation of eligibility policies and procedures, data service delivery, data entry, and file quality assurance. Additionally, 25% of the time should be spent on administrative and compliance responsibilities. 15% of the time should be used to provide staff support, coaching, guidance, mediation, and continuing staff development. The final 10% of the time should be used to support the manager with program oversight, development, and implementation.
INTAKE SPECIALIST

ESSENTIAL DUTIES & RESPONSIBILITIES

- Responsible for effectively working with team staff, volunteers, and interns assigned to the Welcome and Quality Assurance Team
- Supports participants enrolling in the program and works with team staff, volunteers, and interns assigned to the department with emotional intelligence where the positive aspects of business and life are always displayed
- Creates a positive and thriving work environment where all staff, partners, supporters, collaborators, and participants’ ideas and recommendations are considered for the overall improvement of the team and the services provided to participants and the community
- Assist management to secure agency compliance regarding WIOA laws, rules & regulations
- Alert management of compliance and quality findings
- Help develop an internal review process for the Agency that meets all state and federal guidelines and guarantees that processes are being implemented throughout all departments
- In consultation with management, design evaluation and performance measures, which are reliable, valid, and promote continuous quality improvements
- Help manage the Agency’s learning management system and make the certain agency and employee compliance with rules, regulations, and training requirements
- Help train staff in WIOA policies and procedures, and other grants managed by the agency
- Maintain and ensure compliance of all department files
- Maintain compliance with the City issued grants under WIOA, LARISE, and any other grant awarded to the department
- Communicate with management any issues regarding the participants’ files and records
- Perform visual inspections of all files, and all documentation after files are closed
- Works with assigned staff to conduct follow ups of all cases closed as well as update databases with information provided by participants
- Maintains quality control of data, files and produce reports necessary for WIOA submissions
- Identify problems affecting performance and recommend solutions to solve such problems
- Help review all submissions for supportive services and training requests for completeness and make sure that all forms are correctly filled out

CONTINUED
INTAKE SPECIALIST

ESSENTIAL DUTIES & RESPONSIBILITIES - CONTINUED

• Help serve as a technical liaison between quality control and other departments
• Participate in internal assessments and audits as required
• Under manager and director of department, assists in the design, develop, deliver, and maintain of comprehensive compliance training programs and materials
• Help supervise the work of other interns assisting with intake and eligibility work to ensure adherence to quality standards, deadlines, and proper procedures, correcting errors or problems
• Research, compile, and prepare reports, correspondence, or other information required by management or government agencies
• Help manager maintain records pertaining to inventory, personnel, orders, supplies or machine maintenance.
• Complete required training reports on an annual basis
• Develop and maintain working relationships with Community Based Organizations, schools, places of worship, and local government agencies to connect clients to their services offered on site and at their centers
• Manage and ensure validity of the referral process for services from sister agencies
• Interview WIOA referred clients and provide career, aptitude, skill, and educational assessments
• Facilitate and coach in work readiness skills and workshops
• May help develop and maintain Individual Employment Plans for enrolled participants
• Helps process WIOA scholarship applications and identifies and maintains training leverage reports for enrolled participants
• Maintain case files, completes enrollment forms, and maintains databases including ETO, CalJobs, and internal spreadsheets and reports
• Develop, maintain, and facilitate training and curriculum
• Prepare and submits invoices for supportive services, trainings, and expenses
• Maintain reports and tracking of client goals, expenditures, activities, outcomes
• Represent CRCD at events when assigned
• Upholds, follows, supports CRCD’s Mission Statement and 5 Year Strategic Plan

CONTINUED
CHANGING LIVES &
Building Neighborhoods Responsibly

INTAKE SPECIALIST

MINIMUM QUALIFICATIONS
- Prior experience in providing case management, data management, quality assurance and/or job development, staffing or business services in either for profit or non-profit organizations
- Bachelor’s degree in related field; or minimum four years of related experience without formal education
- 2-4 years’ experience in related work
- Reliable, flexible team player who works well with minimal supervision, who has a good work ethic, and an ability to set and maintain personal boundaries
- Demonstrated ability to work on multiple projects simultaneously, and meet deadlines
- Demonstrated knowledge of community resources and services available to participants
- Experience managing a team of highly functional, independent thinkers who work collaboratively and in partnership to support residents secure employment
- Reliable transportation: valid driver’s license, and car insurance as required by law, as appropriate

PREFERRED QUALIFICATIONS
- Dedicated experience in working with vulnerable populations highly desirable
- Bilingual in Spanish/English highly desirable
- Member of the target population a plus