

## **Housing Partnership for Morris County, Inc.**

**Job Description:**     **Intake and Office Coordinator**  
                                  **“Director of first impressions”**

**Hours:**                **40 hours per week**  
                                  **(Flex time to include 2 – 3 evenings a month)**

**Pay:**                    **\$35,000-\$40,000 Dependent on Experience**

**Remote M, F and In office T, W, TH**

**Reports to: Executive Director**

**Summary:** The Housing Partnership NeighborWorks Homeownership Center is a HUD approved nonprofit organization that provides financial education, one-on-one financial coaching, and connecting clients with resources to help them purchase and keep their first homes. We also provide free foreclosure and rental counseling services that includes credit, budget and action planning sessions.

The Partnership is currently seeking an Intake Office Specialist. The Intake Office Specialist is a member of the counseling team supporting the organization’s mission of “Strengthening communities by creating lasting and responsible homeowners through education and financial coaching.

### **INTAKE DUTIES:**

#### **Areas of Primary Responsibility**

- Conduct an Intake and assessment of all client caller needs during initial contact to our agency for housing counseling and other agency assistance programs. This includes but not limited to Home Purchase, Foreclosure Intervention, Financial Capabilities, Rental and Affordable Housing Search Assistance, Education Workshops, etc.
- Provide resource information and referrals; distribute applications for all programs within the department based on client eligibility. Assist with their completion if necessary. Assess client’s need and eligibility for programs offered by utilizing income guidelines for each respective program. Inform client callers of all other agency programs and make internal referrals when appropriate.
- Process client counseling packets when they have been returned, update all client management systems with noted interactions for client file processing which includes CounselorMax and/ SalesForce. Ensure that client packets are complete and enter all required client data into the system and assign counselors using an established round-robin for counselor assignments. Work with Hosing Counseling Director to ensure schedule stays on task.
- Maintain online client intake database of all who are seeking assistance by logging into CounselorMax, and other system required for agency grant-funded programs. Daily inputting of all information requested within each relevant data filed for phone and walk-in client intakes
- Process educational workshops registrations and assist counselors with coordinating with any other department event. Ensure that each participant completes all required registration forms and payments.
- Assist with marketing the departments counseling and education programs by conducting research on various household populations and coordinate how best to offer our services to them. Attend agency and invited community outreach events as assigned to represent the agency by speaking about and/or providing information and resource materials regarding all programs and services.
- Conduct follow up calls with clients who initial contact with the organization via Ehome and/or salesforce to assist client in determining if they are ready to become clients with the agency. Converting leads into clients and tracking efforts in our client management system.

## **GENERAL OFFICE DUTIES**

### **Phone, Fax and Mail**

- Answer all phones as initial point of contact including screening/evaluating for referral to appropriate staff member or other agency.
- Take messages for unavailable staff members.
- Take fax, charge and mail registrations for seminars
- Open, date stamp and distribute mail and faxes as appropriate.
- Maintain Outlook for reminders of due dates, appointments, etc.
- Maintain office online calendar
- Maintain Executive Director calendar

### **Bookkeeping:**

- Submit all other invoices to appropriate staff member for approval of payment
- Review all supply invoices and give to ED to approve for payment
- Make Monthly deposits
- Maintain "Receipts" book with copies of invoices or appropriate back up.

### **Supplies:**

- Monitor and maintain appropriate levels of office supplies as needed
- Research and negotiate for best pricing of office supplies
- Store runs when necessary for supplies

### **Filing and Maintaining Records:**

- Maintaining record books for the following:
  - Receipts
  - Board Meeting minutes
  - Office/Copier and repairs
  - Gala Receipts and expenses
  - Office Policies and Procedures
  - Audit file
  - Filing as needed

## **DATA BASE MANAGEMENT**

### **CounselorMax:**

- Enter data of all client information, counseling activities, clients and workshop attendance
- Analyze, maintain, and update data from various sources on a regular basis for consistency and accuracy (return mail, internet) for client contact information.
- Participate in training sessions as needed
- Research statistics and home ownership information for database
- Assist Counselors with Follow up's as needed
- Fridays will be designated Close out days. Housing Counseling Director will give weekly lists of close

## **HOUSING PARTNERSHIP EVENTS, SEMINARS AND MEETINGS**

### **SEMINARS & MEETINGS- ASSIST WITH THE FOLLOWING:**

- Prepare and email flyers for outreach mailings for SBS and Paso a Paso in timely manner
- Log registrations for monthly special programs and SBS workshops that are received via mail, fax or phone
- Prepare, email and/or mail confirmations for seminars and make calls as needed
- Assist with preparation and assembling of handouts for educational workshops as needed
- Assist with class registrations and certificates

### **ANNUAL MEETING, GALA & SPECIAL EVENTS ASSIST WITH THE FOLLOWING:**

- Log ticket registrations for Gala, Annual Meeting, Board Meetings and Special Events
- Maintain list of sponsors and ads
- Maintain list of payments for tickets, sponsorships and ads
- Maintain Board list of attendance

- Coordinate ads and set up booklets for the Gala Ad Journal and the Housing Resource Guide
- Assist with preparation, supplies and certificates
- Assist with on-site preparations
- Assist with silent auctions

**MARKETING & PUBLICATIONS- ASSIST WITH THE FOLLOWING:**

- Distribute newsletter via email; keep up to date with Constant Contact
- Regularly review Website and submit timely changes and updates to website manager.

**TRAINING:**

- Attend local training classes as beneficial to personal development
- Attend Counselor Max basic and advanced training sessions and web presentations
- Maintain core competencies of the business and position by attending training as required
- Other training as assigned per training plan

**ESSENTIAL QUALIFICATIONS**

- Have the capacity to deal with diverse clients with various levels of needs. Also be very personable, respectable and have the ability to deal with difficult clients
- Have at least two (2) years of experience in Social Service/Customer Service/Call Center in direct service role.
- Proficiency in MS Office including Word, Excel, Access, Publisher and Power Point and QuickBooks
- Can speak clearly while responding to clients in need.
- Have Strong Computer skills (Word, Excel, e-mail etc).
- Have Excellent Interpersonal skills, able to manage time skillfully
- Strong Organization skills and vast knowledge of clerical procedures and ability to multi-task
- Experience with Salesforce or other customer relationship management platform
- Ex Bi-lingual Spanish a plus
- Excellent communication skills both verbal and written in English and Spanish
- Detail-oriented, accurate and organized
- Ability to handle multiple tasks
- Accuracy and timeliness in filing and organizing materials and information
- Ability to become proficient quickly in new software
- Ability to identify areas of improvement for processes, policies, and procedures
- Experience with developing training and job aids and with delivering training to co-workers and peers
- Availability to assist at occasional evening seminars with advance notice

**ADDITIONAL SKILLS**

- Knowledge of Morris County and the surrounding region
- Knowledge of housing issues and counseling techniques
- Bi-lingual (Spanish) preferred

Updated July 12<sup>th</sup>, 2023