

NAME:
JOB TITLE: Intake Specialist
DEPARTMENT: Weatherization

FLSA STATUS: Non-Exempt
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OVERALL PURPOSE

The Weatherization Intake Specialist is responsible for supporting office operations and procedures to ensure the effective delivery of Weatherization program services.

ESSENTIAL FUNCTIONS**1. Client Eligibility and Service Delivery**

- Implement procedures to determine client eligibility and service delivery
- Complete intake process to ensure eligibility, efficiency, and accuracy
- Refer clients to appropriate agency or community services
- Maintain detailed case management notes for each customer
- Enter daily client case notes
- Provide clients with guidance on utility conservation and related topics

2. Office Clerical Duties

- Maintain organized and accurate files and information
- Manage databases to track information and data
- Complete documentation, job/case notes, and other required records
- Act as a liaison between auditor/energy educators, client, funding sources and contractors
- Assist with scheduling appointments and making referrals
- Support the WX Director and WX Programs Manager in departmental monitoring activities to evaluate work quality
- Help maintain schedules for weatherization staff trainings for certification and re-certification

3. Program Expenditures Analysis

- Maintain spreadsheets to ensure budgeted compliance
- Coordinate with fiscal staff to match work orders and ensure proper payments
- Track vehicle mileage and fuel receipts
- Review invoices and allocate costs to materials, labor, or health and safety
- Ensure accurate allocation of services to appropriate funding sources

4. Network and Agency services.

- Stay informed about services offered by our agency and other local agencies
- Refer clients to services that can assist with their household needs for self-sufficiency
- Provide effective customer service by delivering direct services or relevant information

5. Adaptability and Continuous Improvement

- Identify opportunities for process improvement and implement best practices
- Adapt to evolving organizational needs and contribute to strategic planning for future growth
- Pursue opportunities for continued professional development

OTHER DUTIES

1. Secure the office at the end of each day and ensure all lights/machines are turned off
2. Maintain cleanliness of workstation
3. Perform other related duties as requested

SUPERVISION RECEIVED

Reports to the Weatherization Program Director

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QUALIFICATIONS

EDUCATION

- High School Diploma required
- Associate Degree in human services or related field preferred

EXPERIENCE AND/OR TRAINING

- Five years' experience in an office environment preferred

ADDITIONAL JOB REQUIREMENTS

- Foster a positive, cohesive, and collaborative work culture
 - Address and resolve day-to-day operational challenges promptly and efficiently
 - Make informed decisions that align with organizational goals and values
 - Communicate effectively with co-workers or customers
 - Adapt to changes in work environment
 - Utilize creativity and organizational skills
 - Stay abreast of technological advancements and integrate relevant tools to enhance office efficiency
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To excel in this role, one must proficiently execute each vital task. The specified criteria outline the necessary knowledge, skill, and/or ability. Reasonable adjustments may be implemented to facilitate individuals with disabilities in carrying out these crucial functions.

I have carefully reviewed the provided job description and comprehensively grasp the outlined requirements. I am capable of fulfilling the essential functions of the role, whether with or without accommodations. I commit to executing all duties and responsibilities to the best of my capabilities.

Employee Acknowledgment

Supervisor Acknowledgment