

Intake Coordinator in the Nuestra Home Center (part-time)

The Home Center Intake Coordinator assists financial capability clients by preparing and gathering essential documents required for various types of one-on-one financial appointments with the counselor. Intake documents are photocopied and organized in the client's file in preparation for client one-on-one discussion. Various types of financial appointments will include but are not limited to, household finances, repair and build credit, buy a home, First Time Homebuyer's classes, learning how to secure a home mortgage including HELOC, reverse mortgage, repair student loan debt or modify existing home mortgage debt to avoid foreclosure. The Intake Coordinator works with the Home Center staff and co-workers as part of a support team effort to confirm appointments and perform regular follow-up to ensure clients are reminded and are responsive to keeping appointments. Flexible work hours are required, as classes and counseling at times must take place in evenings or weekends. Other responsibilities include input into the Home Center database of client demographic information appointment dates, outcomes and other required information to document and track client's progress. This is a 24-hour per week position.

Essential job functions and responsibilities

- Help ensure that new enrollees in First Time Homebuyer Classes understand that individual financial counseling is an integral part of the class sessions, except for anyone currently fully prepared and able to buy a home.
- Take the lead in marketing Home Center classes and counselling, including scheduling and participating in events; preparing online and hard copy marketing materials and messaging; and learning best practices from other financial capability centers in metro Boston.
- Intake Coordinator will assist clients with completing required disclosures, budget and supporting documents needed for appointment with counselor.
- In conjunction with assisting client with gathering documents, the intake coordinator will also perform regular follow-up with clients via e-mail and/or phone to confirm appointments, ensuring maximum results. All communication must be documented in file.
- Collect and enter data on participants and outcomes as required for Nuestra's data collection and evaluation, as well as funders' reporting requirements.
- Become trained and proficient in using the Home Center's Salesforce database and any other systems for data collection and reporting mandated by Home Center Funders.
- Provide information and data necessary for preparing invoices in collaboration with the Finance department and Resource Development department for timely submissions to Home Center funders.

- Assist in preparing funding applications in collaboration with the Financial Counselor and Director of Resource Development.
- Maintain knowledge of Home Center responsibilities required to achieve goals and compliance with grants and contracts.
- Take classes in financial capability counseling and work towards obtaining certifications.

Qualification requirements

- Ability to work collaboratively and to prioritize work and time
- A commitment to continual learning and improvement.
- Self-motivation, curiosity and capability of working in a team with others while maintaining independent judgment.
- Excellent writing and verbal communications skills
- Experience in Excel and working with data; experience in Salesforce or ability to learn and become proficient
- Excellent interpersonal skills
- Experience and skill in customer service to clients.
- Ability to work effectively in a diverse environment which values respect for individuals

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