

Job Title: Client Intake Specialist

Reports to: Economic Opportunity Program Director

Job Status: Salaried / Non-exempt

Job Summary: Community Action Marin is the largest human services provider in Marin County and is designated by the County Board of Supervisors as the “official anti-poverty agency” for Marin County. We are working to make Marin a place where all of us can live with dignity and respect and have an equal opportunity to support ourselves and each other. For over 50 years, we’ve been there when our community needed us most. We now offer more support to more people than any other organization in the county, but demand is growing every day.

The Client Intake Specialist is a primarily client-facing role supporting the entire agency in assessing the needs of community members and connecting them to appropriate resources and services. This individual is the first point of contact for all clients and visitors and provides a positive experience when greeting and serving them based on the values of Relationship, Unity, Service, and Inclusivity.

Primary Responsibilities

- Utilize Agency’s central intake system to assess needs of community members and connect them with resources and services they need to achieve self-sufficiency.
- Answer and transfer incoming calls / retrieve voicemails and transfer messages.
- Help clients who arrive for their program appointments to sign in and announce their arrival to the staff member that they are here to see.
- Accepts packages (Fedex, UPS, etc.)
- Oversee reception area and client intake rooms, ensuring that the space is welcoming to new and returning clients.
- Provide basic Agency overview (both group and 1:1 sessions) to individuals who are interested in receiving services.
- Assist clients with intake application forms, checking paperwork to ensure accuracy.
- Educate clients regarding updates within the agency and its programs.
- Schedule client appointments and make appointment reminder calls for orientations, workshops, and appointments.
- Utilize Agency database to support appropriate appointment scheduling and timely completion of client documents that demonstrate outcomes they achieve as a result of service utilization.
- Manage Emergency Food Box program and ensure compliance with Food Bank guidelines.
- Provide referrals to external organizations and community services.
- Promote and register attendees for orientations, workshops and other CAM events.
- Manage Agency community bulletin board and brochure rack ensure they are updated on a weekly basis.
- Assist with sharing information on community engagement events (i.e., job fairs, campus events, etc.)
- Provide input into Agency client-facing written and online program content.
- Provide oral and written Spanish translation as needed.
- Other duties as assigned.

Required Qualifications

- A strong commitment to social justice, equity and the Agency's mission to make it possible for people to achieve wellbeing by providing the education, mental health, and vital services they need.
- An innovative mindset that values teamwork and collaboration internally and externally.
- 1 year minimum of experience in the role of case manager or similar client assistance position working with underserved low-income clients.
- Excellent written and oral communication skills.
- Ability to work collaboratively with Staff and Families.
- Bi-lingual (English / Spanish) required.
- Well-developed organizational skills, and attention to detail.
- Superior computer skills - including Outlook, Excel, PowerPoint, and Word.
- Desire to learn new technical tools, including database management software.
- Deep understanding – and ability to articulate – the role equity, inclusion, and diversity plays in our work.

Physical Requirements

- Lifting, raising or lowering an object from one level to another (including upward pulling) 10-25 lbs.
- Standing, sitting and walking intermittently
- Sit stationary at a desk for extended periods of time
- Ability to operate office equipment (computer, phone system, fax and copy machines)
- Ability to reach overhead, grasp, stoop; push and pull objects such as files and file cabinet drawers