



## **INTAKE COORDINATOR (full-time, non-exempt)**

Annual base pay range: \$68,000 - \$74,000

### **Purpose**

The Intake Coordinator's ("Intake Coordinator" or "IC") primary purpose is to provide full-service Workforce Innovation and Opportunity Act (WIOA) intake to help people acquire the skills, certifications and experience to become gainfully employed. The IC serves as the first contact for workforce participants and sets expectations on timing and accountability for program participation. They are an integral part of the workforce team, creating marketing collateral, doing outreach and staffing events. If the IC has the aptitude and desire, after six months of training with above-average progress, the IC may request to train in case management and/or financial empowerment coaching.

### **Overview**

The Intake Coordinator provides intake coordination on an equity basis, co-enrolling qualifying WIOA participants in grants under the supervision of the Senior Workforce Coordinator and Operations Performance Manager. This position also helps promote and support all workforce events and seeks to maximize accessibility and inclusivity. Given these duties, the ideal candidate is technologically proficient, highly organized, community-focused and bilingual in Spanish.

Intake coordination is the full protocol needed to engage someone in their future. It means building trust, setting expectations, and breaking down processes to manageable pieces. Data capture and advancing participants requires organization and discipline. The data capture elements include JotForm, Salesforce and CalJOBS. Part of intake is identifying barriers. The IC is key to organizing, marketing and staffing workforce events, and keeping web, social media and marketing content updated.

The Intake Coordinator is a full-time, non-exempt, benefited position working primarily with the Senior Workforce Coordinator and the Workforce Program Analyst and reporting to the Operations Performance Manager. The IC has a critical role to fulfill as part of a productive, adaptable and collaborative team. To be successful in this role, the IC must engage workforce clients of varying backgrounds with sometimes complex barriers to opportunity and strive for equitable pathways forward.

### **About Us**

San Pablo EDC is a dynamic nonprofit whose mission is to act as a catalyst for equitable economic opportunity. It facilitates a wealth of education and training for workforce, businesses and first-time homebuyers. San Pablo EDC is a member-based, professional services organization, which partners widely in the East Bay Region.

### **To Apply**

<https://form.jotform.com/261536770591059>

### **Responsibilities**

The IC will be responsible as outlined below along with other duties, as may be assigned from time to time. These duties are not intended to be exhaustive, but rather, representative of the scope of responsibilities.

### **Intake Coordination & Management**

- Lead the WIOA intake process from fielding queries and processing interest forms through orientation and approval with documentation
- Support, and eventually, conduct WIOA orientation and maintain workforce information on the EDC's website; coordinate with team members to deliver orientation when unavailable
- Perform WIOA intake coordinator duties, including ensuring applications are complete and accurate, gathering participant documents, entering WIOA applications into CalJOBS and capturing the data in Salesforce
- On an as-needed basis, provide assistance entering or updating activity codes and case notes in CalJOBS to workforce teammates handling case management responsibilities
- Provide outreach and support with Rapid Response-related activities, in terms of intake coordination and referring dislocated workers to appropriate resources
- Coordinate enrollment for San Pablo and grant-qualified families into the Early Learning Center (ELC) for childcare/pre-school, review monthly invoice and submit for payment
- After six months of training and above-average performance, may train in case management and carry a case load of no more than 10 people

### **Data**

- Outreach to workforce participants to gather information needed and enter data and documents into Salesforce & CalJOBS
- Ensure all activities – emails, phone calls, meetings, service delivery, participation in programs, etc. – are captured in the Salesforce database and CalJOBS, as appropriate; work with the Program Analyst, as needed, to train and improve data capture
- Help capture success stories, photos and feedback
- On an as-needed basis, develop and administer workforce surveys in collaboration with input from the team and clearly established goals and timeframes
- Maintain and provide workforce data for grants, as needed, and assist when data is missing or incomplete

### **Logistics, Outreach, Communication**

- Organize logistics for all workforce events, i.e., Zoom set-up, JotForm, web calendar, QR codes, tiny URLs, confirmation with speakers, room set-up, etc.
- Create bilingual marketing collaterals and fillable forms, and perform outreach in person and via eblasts, website and social media
- Gather, curate and organize eblast (semi-monthly newsletter) content
- Create templates, tools, fillable forms or information resources upon request, including the workforce calendar one-pager

- Provide staffing support for workforce and youth scholarship events whether virtual or in-person, including registration assistance and assisting clients connecting to the event
- Assist with the creation of content for San Pablo EDC-City of San Pablo collaborative El Portal quarterly newsletter; provide Spanish translation and proofing for teammates

### **Job Readiness**

- Assist as needed and train regularly to facilitate Connect to Opportunity; serve as lead facilitator if program lead is unavailable. Support inclusion of mock and informational interview skills, as well as “Ask Me Anything” sessions as a part of Connect.
- Assist the Workforce Team with identification or coordination of job readiness and employment education partner programs, which include by are not limited to resume support, explaining gaps in employment, financial education, computer basics, background clean-up, taking feedback/direction effectively; there is no limit of essential skills topics the Workforce Team might find useful.
- Refer workforce participants to appropriate services and provide warm hand-offs to teammates, as well as outside agencies (i.e., housing, WIC, ELC, etc.).
- If desired, bring back elements of the job readiness boot camp
- If desired, may be trained and licensed to provide financial empowerment coaching

### **Case Management (if skills or interest present as described above)**

- Train with Workforce Team to learn best practice protocol for WIOA case management, including documentation approval process, administration of objective assessments and creation of individual employment plans (IEPs), ongoing career planning and vocational counseling, individual training account (ITA) requests, ITA modifications, criticality of capturing and updating in a timely manner all activity codes, case notes, progress reports, due dates, etc.
- Case manage up to ten WIOA-enrolled workforce participants.
- Train on best practice to exit participants, especially documentation and QA needed before cases are closed

### **General Workforce Administration**

- Complete peripheral duties and tasks as assigned.

### **Requirements**

#### **Skills**

- Strong organizational skills and a propensity to develop and follow a disciplined protocol
- Skilled at outreach and engagement in an equitable manner
- Strong communication skills both written and verbal
- Excellent interpersonal and rapport-building skills
- Salesforce or other CRM skills which translate to Salesforce data capture, milestone tracking, follow-up tasks and report generation
- Documentation skills discipline

- Highly proficient in MS Office Suite and social media content preparation
- Basic Adobe Creative Suite or Canva skills required; substantial experience preferred
- JotForm and Adobe Acrobat Pro strongly desired
- Website content management preferred
- Second language proficiency desirable

## **Experience**

Qualified candidates will have experience with:

- CalJOBS and the general WIOA process, or a similar process that involves orientation, application and documentation
- Confidential handling of sensitive information
- Data collection, input and analysis
- Customer service, in person and via phone
- Program coordination and management
- Marketing and outreach materials, activities and events
- Facilitation, workshop delivery, and events coordination

## **Education and Certifications**

- An Associate's Degree and three years of directly related experience in economic development, social work, public administration, or related field is required.
- Bachelor's Degree from an accredited college or university with major course work in social work, economic development, public or business administration, finance, or a related field with relevant work experience preferred.
- Membership and participation in related professional organizations are desirable.
- Certification or experience with Adobe Creative Suite, Salesforce, and/or economic development preferred.

## **Basic Requirements**

- California Driver's License
- Right to work in the United States of America

## **Attributes**

- Has a professional presentation
- Is an outgoing, proactive communicator
- Is engaging, positive and brings a productive attitude to work
- Has an aptitude to learn
- Is creative and collaborative
- Is efficient and productive
- Is attentive to details
- Excellent time management skills

- Has a strong work ethic and values quality
- Possesses a natural service orientation
- Demonstrates independent problem-solving and decision-making
- Manages competing priorities effectively

### **Pay Range Qualification**

#### **Beginning of range: \$68,000 – 70,000 Intake Coordinator I**

- New to this level of responsibility
- There are areas of responsibility for which training will be necessary and no or limited prior experience
- Needs to be trained on several or all software and database platforms, notably Salesforce, CalJOBS, Notion, Canva and MS Teams
- Requires training in WIOA and workforce intake protocol
- Has sufficient operational and program experience to provide support and coordination
- New to economic development

#### **Mid-point: \$71,000 Intake Coordinator II**

- Sets, effectively communicates and meets expectations
- Has held this level of responsibility for at least a year
- Demonstrates successful track record following protocol and meeting QA standards
- Demonstrates ability to deliver timely results & help organization meet deadlines
- Demonstrates appropriate use of resources, especially time management
- Manages complex workflow effectively
- Performs well in all areas of responsibility; may require some training to achieve advanced levels of competencies
- Becomes certified as a financial coach and/or starts training in case management
- Displays consummate professionalism

#### **High end: \$72,000 – 74,000 Senior Intake Coordinator**

- Has held this level of responsibility two years or more and proven work quality as well as reliability
- Collegial and professional; has earned the trust of colleagues inside and outside the organization
- Has depth of demonstrated experience in all areas of responsibility
- Demonstrates a wide scope of skills and comfort stepping into roles as requested
- Proactively coordinates program, event and workshop planning
- Is actively case managing at least 10 new WIOA participants annually meeting all QA requirements and with above average performance