

Corporation of Guardianship

Job Description

Intake & Outreach Coordinator

General Statement of Duties

The Intake & Outreach Coordinator is the initial point of contact for anyone seeking information regarding Corporation of Guardianship's (CoG) services. He/she is responsible for promptly responding to all inquiries from prospective clients and their families and referring professionals over the phone, through emails, and/or in-person meetings. He/she gathers essential information about the prospective client's situation such as their legal issues, personal information, background of their situation, and any other relevant details to help the intake team understand and evaluate the case. The Intake & Outreach Coordinator serves as a liaison between the organization, prospective clients, and professional stakeholders. He/she works with the internal teams and external stakeholders to ensure that intake and outreach efforts are aligned with the CoG's strategic goals. Building and maintaining relationships is a core part of the role as well as the ability to effectively communicate CoG's mission, vision, and service areas.

Distinguishing features of this Position

The Intake & Outreach Coordinator is driven by the importance of CoG's mission. This position is the primary, front-facing contact for the organization for all prospective clients and referring professionals. He/she must be a passionate advocate for CoG, effectively conveying the organization's mission and services while building positive relationships with clients, and their families, professional stakeholders, and the internal team to ensure a smooth intake process and outstanding customer service before, during, and after onboarding. The Intake & Outreach Coordinator works under the supervision of the Executive Director.

Illustrative Examples of Work

- Greet clients and visitors to the organization in a professional and friendly manner.
- Respond promptly to all inquiries received by the organization whether by phone, email, or in-person and walk them through the process of engaging CoG's services.
- Ensure that all prospective clients and professional stakeholders' questions are answered clearly and accurately.
- Conduct an intake interview to gather essential information about the client's situation and evaluate the prospective client's needs.
- Collaborate with the intake team to assess whether a prospective client is a good fit for the organization and make referrals to other organizations as appropriate.
- Manage the intake process (from start to finish) efficiently and accurately, ensuring all necessary information is obtained and documented.

- Utilize Clio Grow to record and track client interactions and document the completion of steps in the intake process.
- Coordinate scheduling of intake meetings and establish a strong follow-up system, which includes proper calendaring, to ensure deadlines are not missed.
- Triage and direct calls and questions to appropriate staff members, identifying any urgent matters for immediate attention.
- Disseminate outreach materials and connect with various target audiences, such as referring professionals, to promote the organization's mission and services.
- Assist in outreach activities in support of the organization's strategic growth goals and objectives, including representing CoG at community outreach events and tradeshow.
- Support the financial and care management staff as requested in communicating with and assisting clients, families, and other stakeholders in matters of each client's health, safety, financial security, and overall quality of life.
- Support the administrative staff in day-to-day office management including ensuring that outgoing mail is taken to the post office each day and other administrative tasks as directed.
- Perform all duties in accordance with the CoG's policies and procedures, safety guidelines, and client confidentiality standards.

Knowledge, Skills, and Abilities

- Ability to communicate clearly, compassionately and respectfully with all callers, clients, and stakeholders (internal and external) in a culturally competent manner.
- Must have superior organizational skills, accuracy, and attention to detail.
- Must have the ability to multi-task and move efficiently from one inquiry to another.
- Knowledgeable of computer programs (specifically Microsoft Office) including word processing, databases, spreadsheets, email and internet.
- Experience with Clio Legal Practice Management Software is desirable.
- Proficiency in the use of office equipment including computer, phones, copier, etc.
- Ability to make clear decisions which are timely and reflect CoG's priorities.
- Ability to understand, support, and advocate for the complex needs of CoG's clients.
- Maintain confidentiality, diplomacy and professional demeanor at all times.

Desirable Education and Experience

Associate's degree in human or administrative services or a related field. A Bachelor's degree is preferred. A minimum of 2 years of professional experience required. A combination of education and professional experience will be considered. Must pass background check.

Special Requirement

Possession of a North Carolina Driver's License.