



**San Francisco Housing Development Corporation  
FINANCIAL EMPOWERMENT CENTER**

<b>JOB TITLE:</b> Program Assistant/Intake & Triage Specialist	<b>LOCATION:</b> Financial Empowerment Center 4439 Third Street, SF HYBRID Remote Work /In-Person Work
<b>IMMEDIATE SUPERVISOR:</b> Director of Financial Empowerment & HUD Housing Counseling Programs	<b>PAYGRADE:</b> DOE <b>FLSA STATUS:</b> Non-Exempt

**ABOUT US:**

SFHDC is a 33-year-old, non-profit agency working to foster stability in low- and moderate-income communities of color in San Francisco through the development of affordable housing, the provision of holistic supportive social services, the facilitation of financial empowerment as well as homeownership, and the and economic revitalization of our community.

The goal of SFHDC’s Financial Empowerment Center (FEC), is to create well-informed and empowered consumers and default resistant homeowners. We provide no-nonsense, “no-holds barred” education, counseling, coaching, financial products, and tools that are based on outcomes that aim to build or restore credit, increase savings, reduce debt, and attain an array of personal financial goals, including securing an apartment, purchasing a home, building & sustaining savings, or starting a small business. The FEC Team is a cohesive, fun-loving group that works extremely hard yet maintains a balanced, supportive, and caring environment. As one of our team members often say, “Team Work Makes The Dream Work!”

**OVERVIEW OF RESPONSIBILITIES:**

The Intake & Triage Specialist enhances the effectiveness of Financial Housing Counselors by providing information management support, and is usually the first person that the customers meet or connect with. Thus, the successful applicant must be friendly, professional, and reasonably accommodating. The Intake & Triage Specialist supports the Agency’s HUD Certified Housing Counseling Services and makes appropriate referrals to other community resources. He or she must be knowledgeable of, and remain abreast of, current resources related to obtaining, stabilizing and maintaining housing.

**ESSENTIAL FUNCTIONS:**

Housing Counseling Support:

- Answer phone calls, voicemails and emails directed to the FEC;
- Conduct triage of all inquiries, provide information, refer out or conduct client intake;
- Conduct client intake and enter information in CMS; explain counseling intake process;
- Follow up with client to obtain any missing client documentation;
- Maintain client records by updating account information;
- Instruct clients how to scan and upload documents to our secure Hightail app or how to scan and fax documents that are needed;

- Schedule counseling appointments upon receipt of complete client files;
- Maintain appointment calendar for counselors (via Acuity Scheduler and Google Calendar)
- Maintain electronic filing and retrieval systems;
- Record weekly FEC Team meeting discussions.

Educational Workshop Support:

- Set up workshops in CMS and on our webinar platform (GoToWebinar);
- Communicate workshop changes to local partners;
- Originate, review and manage workshop attendee reports and communications;
- Manage weekly workshop eblasts via constant contact;
- Maintain FEC Constant Contact database and lists; respond to “CC” replies to FEC e-blasts
- Manage quarterly client status update inquiries;
- Assists with group workshops on evenings and Saturdays, as scheduled.

Communications Support:

- Maintains customer confidence and protects operations by keeping information confidential
- Maintains professional and technical knowledge by attending educational workshops; reviewing professional publications; establishing personal networks; participating in professional societies
- Contributes to team effort by accomplishing related results as needed

Outreach & Referral Support:

- Develop and maintain a network of referral agencies;
- Provide information on housing programs to clients, other service providers and general public;
- Develop outreach activities to inform public about program;
- Represent SFHDC in various community forums

**SKILLS/QUALIFICATIONS:**

- Maintain professional and technical knowledge by attending educational workshops; reviewing professional publications; establishing personal networks; participating in professional societies;
- Ready, willing and able to serve as a member of a highly-functioning team;
- Capable of managing time effectively and working independently;
- Must be proficient in MS Excel, Word, and Google Apps;
- Basic working knowledge of MS PowerPoint would be a plus;
- Bi-Lingual in English and Spanish, Tagalog, Vietnamese, or Mandarin/Cantonese a plus, but not required;
- Data Entry, Virtual File Management, Administrative Writing Skills, Reporting Skills, Scheduling, Microsoft Office Skills, Organization, Time Management, Presentation Skills, Verbal Communication, Client Management Systems, Multi-tasking;
- Minimum 4 years’ experience providing case management, intake, triage, and administrative assistance in housing, health care, real estate, or crisis management;
- Must be able to maintain appropriate professional boundaries with clients under extreme stress and duress;
- Must be comfortable working with diverse people from a variety of backgrounds.

**SPECIAL REQUIREMENTS:**

- Must possess a valid driver's license issued by the State of California.
- Must have reliable transportation.
- Must have reliable internet suitable for remote work environment.
- Must be able to work some evenings and weekends as necessary.

- Must be able to work in a fast paced environment and still meet deadlines.
- Must be able to travel out of state for quarterly trainings & continuing education.

**SALARY AND BENEFITS:** Salary will be commensurate with experience. SFHDC offers a benefit package which includes up to 100% employer-covered health insurance for the employee, 13 paid holidays, flex time, paid sick leave and vacation time. We support and pay for ongoing continuing education and professional development.

**PHYSICAL CONDITIONS AND NATURE OF WORK CONTACTS:**

Currently most staff is working remotely. Upon resumption of full in person activities, this will be a hybrid remote/in-office position. When at the office and/or in a classroom setting. Involves frequent walking or standing, as well as frequent contact with clients, outside agencies, private housing providers, financial institutions, Realtors and the general public.

**Physical Demands:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus.

**NOTICE:** This description is to be used as a guide only. It does not constitute a contract, commitment or promise of any kind. SFHDC reserves the right to change, add, delete, upgrade or downgrade the position as dictated by business necessity at any time with or without notice.

SFHDC does not discriminate on the basis of race, color, gender (including actual or perceived gender, and gender identity), sexual orientation, age, marital status, medical condition, religious affiliation, veteran status, national origin, citizenship status, mental or physical disability, or any other characteristic protected by applicable state, federal or local law. SFHDC will consider qualified applicants with criminal histories in the manner consistent with the requirements of the San Francisco Fair Chance Ordinance. If you need a reasonable accommodation in order to apply for a job, please let us know. If the reason you need an accommodation is not obvious, we may ask for documentation confirming your functional limitations.

**Interested Persons: Please submit a resume, cover letter and SFHDC Job Application (<https://sfhdc.org/careers/>) to [info@sfhdc.org](mailto:info@sfhdc.org) OR FAX: 1-866-652-4077**

SAN FRANCISCO HOUSING DEVELOPMENT CORPORATION  
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**DEADLINE: Open Until Filled**

The San Francisco Housing Development Corporation  
is an Equal Opportunity Employer/Drug Free Workplace and is committed to the belief that each individual  
is entitled to equal employment opportunity.