

**Cal Poly Humboldt Sponsored
Programs Foundation
Job Announcement**

This is not a state position

Job Title: Client Intake Specialist

Location: Arcata, CA

Hours: Full Time, 12 months/year, non-exempt

Wage: \$22.00 to \$24.00/hour. DOE

Project Name: Northern California Small Business Development Lead Center (NorCal SBDC)

Supervisor: Client Process Manager

GENERAL INFORMATION

NorCal SBDC is part of Cal Poly Humboldt's Sponsored Programs Foundation. The Intake Center is located in Arcata, CA. The program serves the business community in 36 northern counties of California with no-cost education and consulting. Funding for these programs comes from the federal Small Business Administration (SBA), and the California Governor's Office of Economic Development (GO-Biz). Cal Poly Humboldt has hosted the SBDC program since January 2006. The SBDC Call Center was established in 2019. Its purpose is to centralize the business client screening and intake processing for our SBDC Service Centers located throughout northern California. The Client Intake Specialist is a full-time, 12-month position and is non-exempt. The job offers a competitive benefits package including group health, dental, and vision. The schedule is 40 hours per week, Monday through Friday, with varied schedules/occasional weekend and evening hours. While continuation of this position is foreseen for years to come, all NorCal SBDC positions are contingent on continued federal and state funding. This is not a state or federal position.

POSITION SUMMARY

Under the general supervision of the Client Process Manager, the Client Intake Specialist is responsible for conducting the business client screening and supporting the management of a region-wide Call Center. This position will work closely with senior management and staff of the Service Centers to support the call-in protocol, the communication channels to individual centers and integration of screening and intake materials with the SBDC client database. The Client Intake Specialist will help our clients to better understand the full potential of our SBDC counseling and training services.

This position will support day-to-day activities of the client intake call center, help assure quality control, communicate frequently with the Service Centers' staff, and aid in building and implementing online tools and resources for small businesses. The Client Intake Specialist will directly be in contact with clients and potential clients seeking SBDC services. The ideal candidate will be self-motivated, resourceful, and have strong interpersonal skills and impeccable communication skills.

ESSENTIAL FUNCTIONS & RESPONSIBILITIES

- Communicate with SBDC Center Directors about clients' needs on an ongoing basis;
- Implement Lead Center priorities and criteria for accepting potential clients;
- Conduct intake interview with potential clients applying for SBDC counseling services and create accurate reporting entries;
- Use of online scheduling platforms and calendar;

- Support research and streamline client process at all centers, identifying commonalities, and upholding a set of common protocols;
- Appropriate use of online tools that assist in client processing;
- Aide in communicating intake updates to service centers to understand goals and priorities of the organization;
- Support Manager in conducting periodic surveys of clients and potential clients to ensure quality control;
- Interact with all levels of management, both internally and externally;
- Enter, modify and maintain accurate client files and records;
- Help research and compile data for statistical, financial and programmatic reports.

KNOWLEDGE, SKILLS & ABILITIES

- Excellent interpersonal skills;
- Experience providing exceptional customer service;
- Understanding of professional communication styles;
- Strong preference for small business or entrepreneurial experience;
- Experience using Microsoft 365 and Google Workspace;
- Strong project management and time management, along with performance skills;
- Ability to develop strong relationships and work with senior level managers;
- Very effective in written communications—technical, formal and informal;
- Strong verbal communications—one-on-one, on the phone and videoconferencing;
- Confidentiality is critical for this role.

PREFERRED QUALIFICATIONS

Preference will be given to candidates who demonstrate the following:

- Prior experience working in a customer service position/call center experience;
- Prior experience working with the small business community, economic development programs, and/or small business ownership;
- Prior experience working with confidential information preferred;
- Experience working with a CRM system;
- Ability to communicate in more than one language: Spanish preferred.

MINIMUM QUALIFICATIONS

- At least one year of experience working within the small business technical assistance/consulting field (SBDC or similar), working at a call center, or related experience;

APPLICATION PROCESS

Qualified applicants should submit the following items via email to careers@norcalsbdc.org

1. Cover letter
2. Résumé
3. Three *professional* reference contacts
4. [Cal Poly Humboldt SPF Employee Information Form for Applicants](#)

Position will remain open until filled. Apply before Monday, August 17, 2026, 5pm to be included in the first round of application reviews.

ADDITIONAL INFORMATION

This position requires regular travel throughout Northern California and includes occasional evening and weekend commitments. A competitive benefits package is offered, including retirement, health, dental, and vision coverage.

While long-term continuation is anticipated, all NorCal SBDC positions are contingent upon continued state and federal funding. This is not a state or federal position.

Cal Poly Humboldt Sponsored Programs Foundation is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex including sexual orientation and gender identity, national origin, disability, protected Veteran Status, or any other legally protected status. More information about Cal Poly Humboldt SPF's Equal Employment Opportunity hiring can be found [here](#).

SPF adheres to the policy of employment at will, which permits the employer or the employee to end the employment relationship at any time, for any reason, with or without cause or notice as permissible by law. No SPF representative other than the Executive Director may modify at-will status and/or provide any special arrangement concerning terms or conditions of employment in an individual case or generally and any such modification must be in a signed writing.

Maintaining eligibility to work in the United States is a condition of employment. Cal Poly Humboldt Sponsored Programs Foundation does not sponsor visas for staff, management, or temporary positions. For assistance with the application process, please submit an Accommodation Request Form, which can be [found here](#) or contact ADA Coordinator at 707.826.3626 or confidential fax at 707.826.3625. For more information regarding accommodation, you may also visit the Cal Poly Humboldt Human Resources website at <https://disability.humboldt.edu/>. Individuals in need of a telecommunications relay service may contact the California Relay Service at 877.735.2929 TTY.

A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered this position within Cal Poly Humboldt SPF. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current Humboldt SPF employees who apply for this position. Background checks will be conducted only after a conditional offer of employment and in compliance with California Fair Chance laws.