



Position Description
Lead Client Services Specialist – PSE Help

Title: Lead Client Services Specialist – PSE Help	FLSA: Non-Exempt
Wage Range: 42	Reports To: Program Manager - Energy
Last Update: October 2024	Type: Full Time

Summary:

This position assists and supports the Program Manager in the successful execution of the Puget Sound Energy-Home Energy Lifeline Program (PSE-HELP) for the Council. It provides support to the assigned office location through duties that encompass client service delivery of energy, utility, and fuel assistance funds; performs direct client services, including eligibility determination for the Energy Assistance Program; and completes all paperwork incidental to a client application.

Typical Work:

Supervisory Responsibilities

- Assign work to other client service specialists as directed by the Program Manager.
- Report directly to the Program Manager any/all program or staff concerns;
- PSE reports.
- Tracking log reports/reconciliation completed daily.
- Community messaging for scheduling energy (phones, web page, etc.).
- Scheduling and engaging outreach activities;
- Answering daily program related questions that arise from other team members.
- Training new staff to be CSS-energy intake workers.
- Oversight of assigned county files, including maintenance of pending files (timeliness of service dates, notices, denials) and the file cross-checking activity.
- Actively participates in weekly and quarterly PSE meetings;
- Other duties as assigned.

Client Services Responsibilities

- Reviews applicant-submitted information from PSE via their Bill Discount Rate program and determines eligibility.
- Takes point on the monthly application verification list provided by PSE and verifies required documentation; requests additional documentation from clients or other appropriate sources as necessary;
- Processes Puget Sound Energy Home Energy Life Program (HELP) applications; may also provide backup support for the Low-Income Heating Assistance Program (LIHEAP).
- Determines potential benefit amount and advises client of the payment process.
- Follows up on incomplete files (as needed).
- Maintains complete, accurate, and confidential client files;
- Provides intake and potential eligibility determinations during outreach (as directed);
- Assists with daily reporting of pledges and weekly reporting of payments to Puget Sound Energy.
- Assists in the compilation of other weekly program statistics as requested.
- Provides backup reception duties as requested, including screening incoming calls, scheduling appointments, and providing information and referral services.
- Operates office equipment incidental to duties; preparing client files, typing, and filing, preparing mailings;

- Performs other duties and work as required/assigned.

Education & Experience:

- High School Graduate or GED equivalent;
- Previous experience as a Client Services Specialist.
- Two years paid experience in social services or related field. Up to one year of volunteer experience (2,080 hours) may be substituted for paid experience.

Required Requirements:

- Washington State Driver's License.

Knowledge and Abilities:

- Knowledge of the English language.
- Basic reading, writing and math skills.
- Basic office practices, procedures, and office equipment;
- Knowledge of the fundamentals of interviewing; crisis management techniques, and how to source local resources;
- Able to interpret federal regulations and guidelines.

Leadership:

- Capacity for managing people, remaining focused during challenges, and delivering timely results.
- Demonstrated ability to foster a culture of mentorship, positivity, and being a role model as a leader in the program.
- Flexible, collaborative, and proactive; a team leader who can positively and productively impact tactical initiatives.

Decision Making:

- Able to analyze, evaluate, and synthesize information is essential for making informed decisions.
- Able to think creatively to identify unique and effective choices.

Time Management:

- Proficient in time management techniques to consistently meet deadlines. Perform effectively under stressful conditions and within time constraints.

Organization:

- Efficiently organize assignments, establish priorities, and manage workloads independently.

Communication:

- Uses active listening techniques by listening attentively to others, considering their input, and asking clarifying questions can lead to better-informed decisions in group settings.
- Demonstrated ability to communicate and effectively interact with people across cultures, ranges of ability, genders, ethnicities, and races.
- Practices tact, courtesy, and discretion.

Adaptability:

- Understanding of adapting to changing work environments. Prioritize tasks and adapt quickly to evolving organizational needs, ensuring efficient task completion.

Emotional Intelligence:

- Understanding your own emotions, biases, and preferences is crucial for making unbiased decisions.

- Recognizing and understanding the emotions and perspectives of others is essential, especially in interpersonal and group decision-making contexts.
- The ability to manage your emotions and stay calm under pressure is important for making rational decisions.

DEI (Diversity, Equity, and Inclusion):

- Ability to work with efficiency and flexibility, with a commitment to developing equitable and supportive team practices that promote team members health, wellbeing, and sustainability.
- Engage in training, conversations, and operationalize equity, diversity and inclusion within the programs and teams.

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.

- Be able to occasionally move about inside the office to access file cabinets, office machinery, etc.
- Able to constantly operate a computer and other office productivity machinery like copiers and computer printers.
- Able to communicate verbally and in writing with others.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The work environment includes an office environment which is usually quiet.

The statements contained in this position outline reflect general details as necessary to describe the principal functions of this job, the level of knowledge and skill typically required and the scope of responsibility but should not be considered an all-inclusive listing of work requirements. Individuals may perform other related duties as assigned including work in other areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload.

Acknowledgment

I have read the above job description and understand the requirements. I have the ability to perform all of the functions listed above with, or without reasonable accommodation. Furthermore, I understand that this is not to be construed as an employment contract. I acknowledged having received a copy of this job description.

Employee Signature

Date