

CLIENT SUPPORT AND OUTREACH REPRESENTATIVE

DEFINITION

Under general supervision, provides prompt, courteous, general and technical support, and outreach duties; assists clients to navigate and effectively use software applications, including the Applicant Portal, Tenant Portal, and the Owner Portal as well as other electronic agency products and websites as applicable. Provides general technical support to clients, in person or via telephone, of the Santa Clara County Housing Authority (Agency); identifies software application outreach needs for the Agency's clients and stakeholders; hosts and coordinates community outreach, workshops and trainings to applicable software users to promote the Agency's goals related to the software applications; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Training and Outreach Supervisor. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is a journey-level classification, in which the incumbent is responsible for hosting, coordinating community outreach, workshops and trainings to promote Agency goals related to the software applications, receives and processes clients request for assistance with software applications used in the Housing Department, including the Applicant Portal, Tenant Portal, and the Owner Portal. The Client Support and Outreach Representative receives only occasional instruction or assistance as new or unusual situations arise and is fully aware of the operating procedures and policies of the work unit to which assigned and functions with a high degree of independent judgment and initiative.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the rights to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Provides phone and in person support to clients who have questions or need assistance to navigate and effectively use the following software applications: Applicant Portal, Tenant Portal, and the Owner Portal as well as other electronic agency products and websites as applicable.
- Maintains SCCHA website related to the Section 8 program.
- Receives and evaluates requests for service, diagnoses problems, troubleshoots and implements remedial actions, researches documentation and determines solution, and resolves problems with software, security and accesses controls, and systems issues; including creating accounts and resetting passwords, documents and escalates issues to specialized or higher-level staff and/or vendor for resolution as appropriate.
- Writes and maintains user and technical operating instructions and documentation; provides training to users on software applications usage, basic computer/smart device navigation, and security practices and advise on best practices.
- Maintains information on scheduled systems maintenance, including upgrades and outages; informs users as needed.
- Maintains reports and provides regular reports to agency management on key performance areas and metrics related to application usage and statistical information.
- Develops and implements a marketing plan for the three applications. Works closely with marketing consultants to provide regular feedback to guide marketing material development including attending meetings and facilitating internal approval processes.
- Identifies software application outreach needs for the Agency's clients and stakeholders; hosts and coordinates community outreach, workshops and trainings to applicable software users to promote the Agency's goals related to the software applications.
- Provides design and functionality feedback to applications software developers and consultants to enhance applications products. Responsibilities include attending meetings, taking the lead on testing, documenting and communicating feedback and other duties as assigned.
- Establishes and maintains contact and working relationships with all Agency departments, local, state, and federal agencies for acquisition of necessary information, and/or for the implementation of cooperative programs and activities.

- Identifies housing program related training and housing program outreach needs for the Agency's clients and stakeholders; hosts, co-hosts and coordinates community outreach, tenant and landlord resource fairs, workshops and trainings to develop, build and maintain productive relationships with, community-based organizations, and other organizations or individuals to promote the Agency's MTW program goals.
- Orients other staff to the processes and procedures of the tasks performed in this classification.
- Performs other duties as assigned.

QUALIFICATIONS

Education and Experience:

An associate degree with coursework in computer science, information systems or related field and two (2) years of experience providing software application, customer desktop support.

Licenses and Certifications:

Possession of or the ability to obtain and retain a valid California Driver License and a driving record acceptable to the Agency.

Knowledge of:

- Principles and practices used in the installation, evaluation, troubleshooting, and maintenance of software applications, data communication, web-based applications, and other related technologies and equipment.
- Techniques and methods of writing and maintaining user and technical operating instructions and documentation.
- The organization, operation, and functions of the department and the Agency as necessary to assume assigned responsibilities and to determine appropriate point of escalation.
- Critical thinking skills to proactively process and resolve challenges independently and with deliberate time management.
- Strong written and verbal communication skills.
- Solid troubleshooting and research skills that help resolve issues to drive customer outcomes.
- Ability to stay calm in pressurized situations and coach customers through solving problems.
- Ability to drive improvements in efficiency within the department.
- Customer service and telephone techniques.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Principles of record keeping.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Agency staff.

Ability to:

- Perform a variety of technical support functions in the installation, evaluation, configuration, operation, troubleshooting, and maintenance of software applications, network and data communication, web-based applications, and other related technologies and equipment.
- Understand, interpret, and explain hardware and software application solutions to users; research technical materials to provide solutions to problems.
- Participate in design sessions or process improvement sessions and provide sound recommendations and technical input.
- Develop and maintain technical operating instructions and documentation; train users on software applications and hardware usage.
- Use sound decision-making in support of client and business needs.
- Deal tactfully with the customers and staff in providing information, answering questions, and providing customer service.
- Respond to and effectively prioritize a high volume of phone calls or in person requests for assistance.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.

- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances, duties of this class may be performed in an environment with exposure to various odors/fragrances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.