



Director of Financial Advising Job Description

Overview: Beyond Housing exists because home matters. We begin with actual houses and housing preservation, focusing on quality and stability to give people a place to start. But there is more to a home than the house ~ home is about the life that happens in and around the house, as well as the life that fuels and draws out the best of the people within it. That life, in turn, is shaped by the community, its influences, its structures, and the people and dynamics that define it.

Beyond Housing helps entire communities become better places to live. We engage where we're needed, focusing on building consensus among leaders, providing and preserving housing, fostering community structures that shape lives, and guiding systems that make people's lives better.

We lead with vision for what a community can be ~ every community is different, but thriving communities tend to share the same basic set of positive traits regarding housing, safety, education, health, infrastructure, and access to basic human services.

We bring together leaders and resources, volunteers and citizens, and pursue a wide assortment of creative approaches to build stronger, healthier communities for life.

Finally, we are community builders, not kingdom builders. "It's their neighborhood, future, & dreams". Our objective is to help build, and contribute the good things we do for the sake of adding value to the lives of the people we're honored to serve.

Position: The Director of Financial Advising is a key member of Beyond Housing's management team. They are responsible for directing the HomeOwnership Center (HOC) services: HUD Home Buyer education, HUD Housing Counseling, and lending program areas. The HOC serves as a one-stop shop where prospective and existing homeowners can access services required to achieve the highest level of success when purchasing, maintaining, and managing a home. An ideal candidate would possess strong leadership, sales, customer service, residential lending, financial capability, and project management skills with the ability to work with clients, partners and staff at all levels.

Responsibilities include, but are not limited to:

Department Management:

- Establishes long term plans and objectives including timelines and performance measures for financial advising.
- Assists in the implementation of an outreach and marketing strategy designed to expand and broaden the target market; appeal to prospective partners; and maintain Beyond Housing's Homeownership Center as the premier source for financial advising in the region.
- Develops and maintains the standards of practice, policies and procedures for the successful operation of the department including compliance with all state, federal laws and guidelines.
- Conducts periodic systems reviews to identify program strengths and weaknesses, to monitor customer satisfaction and retention and to refine systems as necessary to improve outcomes.
- Promotes and maintains interpersonal communication with staff in order to ensure a team approach, staff participation in decision making, and goal setting in an environment that promotes professional growth and development.
- Monitors and adjusts departmental staffing levels as necessary to meet established objectives, provide high quality customer service and maintain proper balance between efficiency and quality production.

Reporting:

- Completes monthly LIFT reports in ORS via NeighborWorks
- Completes quarterly *Transformative Ten* report in ORS via NeighborWorks
- Assists Director of Evaluation with quarterly HUD reporting and 9902 reporting
- Oversees Smart Goal program reports ensuring program reports are complete

NeighborWorks America/Sustainable Business Initiative (SBI)

- Represent BH on NWA Midwest Region Home Ownership Managers Committee (Quarterly Meetings)
- Act as liaison between SBI/NWA related to Salesforce and Compass (Quarterly meetings with Karen Graziano, NWA and Melford Ferguson, NWA Relationship Manager)

Community Land Trust (CLT):

- Enter monthly payments received from accounting in the Loan Origination Software (LOS) Trakker
- Send monthly mortgage statements to CLT homeowners
- Upload monthly credit reporting file to Credit Builders Alliance (CBA)
- Send CLT account summary to CLT assigned HRC on monthly basis



Director of Financial Advising Job Description

Personal Qualities:

- **Collaborative** -- A dynamic personality that is collaboratively minded, can recognize and identify strengths, seek consensus around mutual goals, and build meaningful relationships.
- **Creative and Curious** -- A systems-thinker and builder, who is not afraid to be innovative in designing solutions and has skills in articulating these ideas and concepts.
- **Methodical** -- Strong analytical, systems, and problem solving skills to evaluate performance, prepare reports, and recommend/implement solutions using independent judgment. Ability to move from concepts to action through strong program design and evaluation.
- **Reliable** -- Leadership skills that reflect and value a team approach, demonstrated integrity, effectiveness, efficiency, and the ability to deliver high quality service. Highly capable of handling multiple tasks, projects and timelines. Excellent oral and written communications skills.
- **Trusted** -- Ability to work with residents, partners, and staff of diversified backgrounds with a positive, optimistic, solutions oriented attitude. Shares a deep respect for the community, its stakeholders and the residents that we serve.
- **Driven** -- Passion for the work and an interest in continuous learning and improvement.

Preferred Experience and Qualifications:

- Bachelors' degree and minimum of 4 years' related experience in financial education/advising, residential real estate, project management, and/or lending or related field
- Graduate degree in social work, business administration, or related field preferred
- Minimum 2 years' supervisory experience
- Minimum 2 years in program management
- Demonstrated project management skills, including managing and prioritizing multiple tasks
- Ability to work some evening and weekend hours as needed
- Knowledge of loan origination, underwriting practices, and financial education and credit counseling best practices
- Extensive experience with office systems, computer literacy, and knowledge of Microsoft Office applications including Word, Excel, Power Point, and Outlook

Supervisor:

- Chief Operating Officer

Supervises:

- Financial Education Manager, Lending Coordinator, Leads Coordinator

Salary and Benefits:

- Full-time salaried position with benefits as determined in current Beyond Housing Employee Handbook

Application Instructions:

Please send **resume and cover letter with your salary requirements** in MS Word format to hr@beyondhousing.org by June 28, 2021. This position will remain posted until it is filled.

The above statements are intended to describe the general nature and level of work being performed by people assigned to this position. They are not intended to be a complete list of all responsibilities, duties, and skills required. Beyond Housing is an Equal Opportunity Employer.

At Beyond Housing, we are committed to promoting ***Diversity, Inclusion, and Equity*** throughout our organization and culture. We strive to understand and appreciate the individuality of every employee and create a better place to work for all. We nurture a culture where everyone positively acknowledges equity through action and is aware, understanding, and appreciative of diversity.

Our vision is to go beyond simple tolerance and fully embrace the things that make each person unique. We recognize that our employees' differences support our ability to advance equity for the communities we serve. Further, we understand that equity is critical to the fulfillment of our mission to help entire communities become better places to live.