



## Homeownership Advisor 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 are 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 are honored to serve.

**Position Summary:** The Homeownership Advisor works to build healthy communities and expand homeownership. As a HUD-approved Housing Counseling Agency (HCA) and NeighborWorks' Homeownership Center, Beyond Housing's goal is to promote and support asset building, and ensure successful, sustainable homeownership for people of all income levels and backgrounds.

The Homeownership Advisor is responsible for facilitating the HUD-approved homebuyer education and counseling sessions, which includes pre- and post-purchase group education classes and individual counseling sessions. As both an educator and a coach, the advisor provides information to enhance the client's progress toward their goals. The counseling sessions may cover a broad array of areas related to the skills, knowledge, and confidence necessary to qualify for, finance, select, buy, and maintain a home. Specifically, the Homeownership Advisor will assess the client's readiness to purchase, analyze credit, budgeting, debt reduction, credit building, and current mortgage guidelines. In addition, the Homeownership Advisor can provide referrals to Beyond Housing community partners, including professional lenders, realtors, home inspectors and property insurers.

**Responsibilities include, but are not limited to:**

- Must be at least 18 years old and have a High School Diploma or GED.
- Facilitates and leads HUD-approved homebuyer education course and financial workshops.
- Updates course content and delivery utilizing adult education principles and participatory techniques.
- Conducts comprehensive individual one-on-one counseling sessions.
- Identifies the required tools and establishes a system for assessing mortgage-readiness status, triaging clients, identifying obstacles, developing strategies to address obstacles, assigning customer tasks, and facilitating clients' progress toward their goal.
- Maintains schedule of appointments for counseling sessions including follow-ups to ensure client is working toward their identified goals.
- Maintains electronic file for each counseling customer that includes credit report, household financial analysis, income documentation, action plan(s), budget, referrals to service providers, and other information as necessary.
- Maintains and updates the client records both during and after each counseling session and adheres to strict codes of ethics and all policy guidelines established by HUD, NeighborWorks, as well as internally, including compliance and confidentiality of files.
- Ensures customer satisfaction is a priority of the counseling program.
- Assists other staff with assigned special projects and other tasks deemed necessary to achieve the overall goals and operate a successful homeownership program.
- Participates in the establishment of annual goals and outcomes for the programs.
- Perform all other duties deemed necessary by the Financial Advising Manager and/or Financial Advising Director.



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### 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:

- Bachelor's degree with at least two years of experience in consumer credit counseling, housing, real estate, or case management.
- Familiarity with the home-buying and loan process, and general underwriting guidelines.
- HUD Certified Housing Counselor or ability to obtain HUD certification within 30 days.
- Excellent verbal and written communication skills.
- Demonstrated presentation skills, public speaking.
- Experience with office systems, computer literacy, and knowledge of Salesforce and Microsoft Office applications including Word, Excel, Power Point, OneDrive, Teams, and Outlook
- Strong project management, facilitation, and change-management skills.
- Ability to interact and articulate effectively and confidently with diverse individuals of all social and economic levels.
- Ability to work independently as a productive team member.
- Ability to be flexible, adaptive, and positive in a constantly changing environment.
- Willingness to work some evenings and weekends and maintain a flexible work schedule.

### Supervisor:

- Financial Advising Manager

### Salary and Benefits:

- Salary Range - \$42,000-48,0000
- Full-time salaried position with benefits for full-time position as determined in current Beyond Housing Employee Handbook

### Application Instructions:

Please send resume in PDF or MS Word format to [hr@beyondhousing.org](mailto:hr@beyondhousing.org) . This position will remain posted until it is filled. This position will remain posted until it is filled.

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***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.