

CHN Housing Partners

Homeownership & Financial Capabilities Counselor

REPORTS TO: Director of Financial Mobility Programs

POSITION SUMMARY:

CHN Housing Partners is a HUD-approved counseling agency, providing high-production, quality counseling services in the following areas: Financial Capabilities, Pre-purchase Homebuying, Mortgage Default & Delinquency, and Rental Topics through their Financial Mobility Center. CHN provides both 1:1 counseling and group instruction to residents of CHN's flagship Lease Purchase program, referrals from other CHN programs, or external partners.

The primary function of this role is to provide Financial Capabilities and Pre-purchase Homebuying 1:1 counseling and group education to CHN's clients. Counseling methods and class curriculums should align with industry standards and best practices, so updating and maintaining relevant content is critical; because of this, ongoing training and learning is highly encouraged.

RESPONSIBILITIES:

- Provide one-on-one financial coaching to individuals, which includes:
 - Using SMART Goal setting methodology, identify goals and priorities to work collaboratively with individuals to reach their goals;
 - Reviewing credit reports and provide guidance around credit repair and credit building;
 - Providing guidance on appropriate banking products, including consumer banking and home purchase products;
 - Creating a sustainable spending plan, based on current income and expenses;
 - Providing guidance to appropriate mortgage products and down payment assistance programs, so that clients are aware of their options as it relates to purchasing a home.
 - Provide continuous support and engagement with individuals in alignment with their work plan and funder guidelines.
- Assist with coordination and facilitation of group education courses on the following topics:
 - Pre-purchase / Homeownership
 - Financial Capabilities
- Coordination and facilitation of group education courses includes the following activities:
 - Identifying and maintaining communication with class presenter partners;
 - Updating and maintaining class curriculums that align with funder guidelines, industry standards and best practices, and the needs of CHN's clientele;
 - Scheduling classes, updating client-facing collateral.
- Maintain all client-level data in CHN's Customer Relationship Management Software, Salesforce. Ensure data is accurate, entered in a timely manner, and meets all program guidelines. Provide feedback to CHN's Salesforce team on any product enhancements or updates that increase the efficiency of our work and impact on our clients. Similarly, ensure all physical files meet program guidelines and are maintained appropriately.
- Obtain and/or maintain the following certifications:
 - NeighborWorks NCHCEC Financial Capability Certification
 - NeighborWorks NCHCEC Pre-Purchase Homeownership Education Certification
 - HUD Housing Counselor Certification

Qualifications:

- 4+ years work in a similar field, with a demonstrated ability to coach and motivate clients towards positive financial action. Competency with: assessing clients' current financial situation through review of credit reports, tax returns, bank accounts; calculating financial health markers (debt-to-income ratio, net worth, etc.).
- Bilingual in English / Spanish is required
- Effective communication skills, both verbal and non-verbal. Excellent customer service orientation. An ability to work well with individuals from diverse backgrounds.

- Comfortable with learning and adapting to CHN's integrated service platform and CRM, Salesforce. Previous experience as a Salesforce end-user a plus.
- Highly detail oriented, experience balancing multiple tasks and priorities at any given time
- Experience with class instruction; comfortability speaking in front of groups.
- Up-to-date certifications a plus, including: HUD Housing Counseling Certification, NCHCEC Financial Capabilities and/or Pre-purchase Homeownership Education. Proficiency in Spanish a plus.
- It will be required that the Certified Homeownership Counselor within 18 months of hire, if not already certified; travel to training event may be required.
- The Community Resource Center would like to expand its reach into the communities it serves – minor travel may be required for outreach events.

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