HOUSING DEVELOPMENT ALLIANCE, INC.

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New Home Specialist

Position Summary

The New Home Specialist is a highly client-focused position that supports families in HDA's New Home Program pipeline. The primary focus of this role is direct client engagement, scheduling and leading phone calls and in-person meetings, completing follow-ups, collecting and reviewing documentation, and providing ongoing coaching to help applicants meet homebuyer readiness milestones. The role provides client-centered education, credit/financial guidance, and readiness tracking, supporting the Financing Review and Credit Review phases by completing required credit-file documentation and collaborating with the Program Manager and Director of Programs to determine counseling needs and next steps.

Responsibilities

- Supports the Financing Review and Credit Review phases in the New Home Program pipeline, ensuring timely progression to the next phase
- Work with other New Home Staff to schedule, lead, and manage the intro to Homeowner class
- Obtain signed credit report authorizations as well as order and maintain credit reports per program SOPs
- Request, collect, and verify required documentation (e.g., income, assets, debts, identity, and other eligibility documents) and ensure completeness for compliance and funding requirements
- Lead the Credit Review and Counseling phases for applicants routed for credit/financial counseling, including assessment of readiness and counseling needs
- Determine when applicants may proceed without counseling based on credit eligibility exceptions and document the decision in the applicant file
- Conduct individualized financial coaching, including budget creation, savings plans, and step-by-step action plans to address credit and affordability barriers
- Provide short-term education on maintaining credit eligibility throughout and after counseling
- Prepare applicants to meet funder eligibility requirements through education, documentation support, and readiness planning
- Coordinate with the Intake Specialist to confirm intake details
- Support application preparation and submission in alignment with SOP (excluding closings), in coordination with the Program Manager

- Communicate applicant readiness status, barriers, and documentation needs to the Program Manager; coordinate with the Program Manager during the funding application phase
- Classify applicants as needing short-term or long-term counseling using SOP definitions
- Collaborate with the Housing Counselor on routing decisions, RFA referrals, and shared client action plans
- Communicate applicant status, documentation gaps, and readiness milestones to the Program Manager in support of program reporting and funding compliance
- Refer applicants to other agencies, as needed when referral criteria are met; support warm handoffs and document referral outcomes
- Coordinate the transition ("handoff") to the Land Specialist during the Property Selection phase, including documenting accessibility needs and readiness requirements
- Maintain accurate, compliant, and well-organized client files across spreadsheets, case management systems, and physical files; reconcile discrepancies promptly
- Perform other duties as assigned

Qualifications

Education and experience

- Associate's degree in a related field (human services, finance, business, or similar) or equivalent combination of education and experience preferred
- 1–2 years of experience in customer service, housing counseling, credit counseling, financial coaching, case management, or nonprofit programs

Skills and competencies

- Experience working with client or case management systems and maintaining accurate, compliant records
- Ability to interpret credit reports and debt-to-income metrics
- Knowledge of or ability to learn mortgage lending basics, credit-building strategies, and homebuyer readiness requirements
- Experience handling confidential financial and credit data with strong documentation and compliance discipline
- Comfortable working with spreadsheets used for compliance tracking
- Ability to explain complex financial concepts in plain language and coach applicants toward readiness milestones
- Strong communication and interpersonal skills, including working effectively across cultural and socioeconomic differences
- High attention to detail and ability to organize and maintain both digital and physical files

- Proficient with Microsoft Office and willingness to learn new tools and reporting systems

Preferred

- Trauma-informed, client-centered service delivery and ability to maintain professional boundaries
- Familiarity with HUD income limits and housing or income eligibility documentation
- Experience working with low- and moderate-income households and providing coaching through complex systems
- Knowledge of affordable housing, home repair, or community development work

What We Offer

- Starting range of $34,000 - $40,000 depending on experience
- Excellent benefits and professional development opportunities

Ready to Apply?

Great! Interested applicants should submit a resume, cover letter, and three references to **taylor@hdahome.org**. We look forward to hearing from you.

All qualified applicants will receive consideration for employment without regard to age, race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), national origin, citizenship, disability, military leave or veteran status, genetic information, or any other status protected by applicable federal, state, or local law.