

CLIENT SERVICES SPECIALIST – HOME PRESERVATION

Pay Rate: \$30.30 - \$32.20

What We Do

Habitat for Humanity Greater San Francisco (Habitat GSF) believes in the power of homeownership to create generational impact. To this end, we **build homes** for first-time homeowners and **sustain homeownership** by helping vulnerable homeowners retain their home as an asset for generations to come.

Your Impact

The Client Services Specialist supports Habitat GSF's Home Preservation Department which invests in selected neighborhoods that have experienced disinvestment and racial segregation across our tri-county region - San Francisco, San Mateo, and Marin counties. The Home Preservation program provided critical repairs and rehabs to low-income homeowners to prevent displacement and to stabilize communities.

Externally, the Client Services Specialist acts as a critical point of contact with the communities we serve, supporting those in need of critical repairs for the home they've owned for years. Starting with initial engagement with a prospective applicant, the Specialist provides clear information about program benefits, requirements, and obligations. They maintain consistent, clear communication, and assists clients to move smoothly and efficiently through each stage of the process until homeowners receive repairs. The Specialist will take a hands-on, culturally sensitive approach, recognizing the importance of building connections and relationships with clients, many of whom are new to complex real estate transactions.

Internally, the Specialist will communicate progress with HGSF loan officers and other staff regarding a client's application status, help colleagues access data to make decisions at critical stages of the process, and secure the necessary documents and agreements to move applicants forward. The Specialist will input and manage a wide range of sensitive data in Salesforce, track progress, and ensure compliance goals are met. This is a central role that requires on-going collaboration with many staff members and requires a strong, communicative team player that is highly organized and capable of managing multiple tasks simultaneously.

Primary Responsibilities

Client Engagement and Support (45%)

- Respond to inquiries from prospective applicants.
- Educate and inform applicants and prospective applicants about home repair opportunities and their respective requirements through one-on-one meetings and information sessions.
- Maintain positive, consistent, and timely communication with all applicants about their application status through intake, screening, eligibility review, and selection.

- Troubleshoot applicant issues and concerns, focusing on fairness, equity, and transparency.
- Ensure application completeness in advance of eligibility review.
- Coordinate the preparation of loan agreements, including securing necessary paperwork from clients and scheduling meetings to review loan terms and other agreements.
- Review loan documents, disclosures, and any additional disclosure agreements with clients in an inclusive, culturally competent, and transparent manner.
- Maintain compliance as a Qualified Loan Originator, considering local, state, and federal rules & regulations.

Project Coordination (35%)

- Conduct application intakes to ensure transparency and accuracy for internal and external compliance purposes, in accordance with HGSF and funder requirements.
- Maintain accurate electronic records in Salesforce and Asana.
- Track and provide timely reports to key team members on the status of milestones associated with repairs of homes for existing low-income homeowners; including applicant intake, application screening, application/eligibility review, selection, loan closings, and construction progress.
- Troubleshoot tech issues, as needed.

Program Support (20%)

- Facilitate educational opportunities within lending program components, including workshop scheduling, partnership development, and providing resources and referrals.
- Support marketing and outreach strategies as necessary, including hosting a Habitat Home Preservation booth at street fairs and public events, holding drop in “office hours” at partner organizations’ facilities, and conducting door-to-door canvassing events.

Qualifications

- Demonstrated experience in client relations or customer service in a government, business (such as hospitality), or nonprofit setting.
- Excellent organizational and prioritization skills and the ability to manage an unpredictable workflow.
- Ability to gather, organize, analyze, and present quantitative and qualitative data succinctly to team members to support effective application review and decisionmaking.
- Awareness of and sensitivity to cultural and socioeconomic characteristics of populations served.
- Demonstrated success as a relationship builder and collaborator; able to work with diverse individuals and groups of people.
- Excellent written and oral communication skills; must be able to communicate with care, clarity, and integrity.
- Proficiency with Microsoft Office programs and databases are necessary.
- Ability to work on weekends, nights, and outside the office up to 30% of the time.

- Ability to work in our tri-county service area with frequent travel across San Mateo, San Francisco, and Marin Counties as needed to meet homeowners and community partners - up to 30% of regular schedule.
- Must have a valid CA driver's license and clean driving record. Must have access to the ongoing use of a personal vehicle for regular client visits across our tri-county region.
- Must be able to pass background check including credit check and DMV check. *(In accordance with state and county law: convictions do not necessarily rule out employment, it depends on the nature and severity of the conviction and is evaluated on a case-by-case basis, check is conducted on last 7 years only).*

Preferred Qualifications

- Familiarity with Salesforce a strong plus.
- Knowledge and familiarity of and/or interest in affordable housing and/or lending.
- Familiarity with lending products or loan origination as a plus.

Work Environment

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, and filing cabinets. This role can require work on weekends, nights, and outside the office in the areas we serve, which is approximately 20% – 30% of the time.

Physical Demands

This is a largely sedentary role; however, some filing is required. This would require the ability to lift files, open filing cabinets, and stand or bend as necessary. Must be able to travel.

Benefits

Compensation for this role is competitive, DOE. This full-time position offers medical, dental and vision insurance, life insurance, long-term disability, employee assistance program (EAP), Flex Savings Account (FSA), 403b retirement account, commuter benefits, 20 paid vacation days, 3 front loaded sick days (accrue up to 72 hours per year), and 13 paid holidays.

EEO: Habitat Greater San Francisco is an equal opportunity employer. Habitat Greater San Francisco strives to reflect the diverse community it serves. Applicants who contribute to this diversity are strongly encouraged to apply. Reasonable accommodation is available for qualified individuals with disabilities, upon request.

Habitat GSF receives federal funds through Self-Help Homeownership Opportunity Program (SHOP) and is required by federal law, to the greatest extent possible, to provide job training and employment opportunities to Section 3 residents. *Section 3 residents are defined as public housing residents or low-income persons who live in metropolitan area or non-metropolitan counties where HUD-assisted projects are located.

To be considered for the role, please apply directly at: <https://grnh.se/ae4fd1236us>