

Client Engagement Representative

Overview of CDCLI

Community Development Corporation of Long Island (CDCLI) was founded in 1969 when government, business and civic leaders on Long Island came together to address the growing demand for affordable housing. That strong tri-sector support continues today.

CDCLI is a regional and national leader in affordable housing and community development, with high standards of performance and a desire to identify and implement creative ways to solve problems and empower residents in the community.

CDCLI is committed to making dreams of long-term economic stability come true. As a chartered member of NeighborWorks®, CDCLI is certified to meet a high standard of fiscal integrity and service performance to assist local residents in achieving their dreams.

With our mission to “invest in the housing and economic aspirations of individuals and families by providing solutions that foster and maintain vibrant, equitable, and sustainable communities,” CDCLI maintains steadfast in its commitment to its three pillars of focus:

- (1) Community Development and Housing for All
- (2) Economic Stability
- (3) Advocacy

The Opportunity

This is an exciting opportunity to join a growing, award winning company that is at the forefront of the sustainable housing community on Long Island. The position is ideal for a professional with exceptional customer/client service.

One of CDCLI’s fundamental pillars is “Community Development and Housing for All.” To achieve that, CDCLI provides full service housing counseling through its Home Ownership Center.

CDCLI’s Homeownership Center offers grants, loans, training, and other assistance to help people achieve and sustain healthy homeownership and to gain financial independence. The HomeOwnership Center provides pre-purchase programs including First Time Homebuyer Education and Financial Fitness Education and Coaching, providing detailed information about the mortgage and acquisition process, the financial and material obligations of being a homeowner, how to modify spending behavior, increase savings, and correct credit blemishes before pursuing homeownership. Post-purchase counseling is also available to assist senior citizens with reverse mortgage counseling to determine if tapping into their home’s equity makes sense for them and to advise homeowners at risk of foreclosure of their available options for home retention or transitioning out of the home, including navigating ratios, modifications, and refinance options.

In addition, our HomeOwnership Center provides a hands-on Home Maintenance Training course that educates participants about basic home repairs, including sheetrock installation, plumbing, and electrical safety, and provides the necessary knowledge for homeowners to speak intelligently with contractors.

Whether the client is a prospective first time homebuyer, a renter dreaming of homeownership, a homeowner facing default, or interested in learning about home maintenance, CDCLI's comprehensive services are designed to make lasting impacts.

Responsibilities

Responsibilities:

- Greeting clients, whether in-person, by telephone or by electronic media, and acting as the first point of contact to identify client needs and connect clients with appropriate services including arranging appointments with Housing Advisors.
- Assisting clients with processing and completion of applications, paperwork and documentation for program assistance
- Providing assistance in organizing, and implementing pre-purchase, post-purchase and foreclosure prevention education workshops including preparing related workshop materials
- Providing assistance in maintaining accurate client files and client tracking system.
- Assisting with client follow-up as necessary.
- Providing assistance in recording and tracking client/program statistics and preparing monthly and quarterly statistical reports through Counselor Max or other data systems.
- Work closely with the Housing Advisors to ensure timely and accurate response to client needs.
- Assemble all client documentation and set up client files for furtherance to counselors, including:
 - Applications
 - Orientation documentation
 - HomeBuyer Education certificates
 - Client Release and Disclosure forms
 - Client Intake Documents
 - Credit Reports
 - Data entry into Counselor Max system
- Coordinating and implementing client classes, including scheduling and compiling presentation materials
- Demonstrates the effective use of Salesforce within the organization as well as the use of effective sales tools and techniques in converting leads to customers.
- Conducts daily review of new leads report in Salesforce and begin customer outreach
- Provides personalized, one-on-one outreach to leads via phone calls or emails in order to positively influence the lead's perception of the organization and perception of the value of the organization's services.
- Document leads development progress in Salesforce including the conversion of leads to customers as well as deactivating leads that are not viable
- Administering daily calendars, off-site file storage, and office supplies.

- Maintaining record keeping systems and ensuring accuracy and completeness of program files,
- Back-up switchboard coverage
- Other duties assigned

Competencies:

- Client Focus
- Problem Solving/Analysis
- Time Management/Multi-tasking
- Communication Proficiency
- Teamwork Orientation
- Technical Capacity
- Fluent in Spanish

Qualifications

- Commitment to the mission of CDCLI
- Client Focus
- Problem Solving/Analysis
- Time Management/Multi-tasking
- Communication Proficiency
- Teamwork Orientation
- Computer proficiency in communication and collaboration, productivity, and presentation tools, Skype or Zoom, Microsoft Teams, Word, Outlook, Excel, and PowerPoint or Keynote.
- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent's.

Required

- Bachelor's degree preferred, with a minimum of three (3) years of related experience.
- **Bi-lingual English & Spanish language skills.**
- Strong organization, verbal and written communication, project management and interpersonal skills.

How to Apply

Competitive salary and robust benefits package.

For consideration, please submit resume and cover letter [here](#).

CDCLI is proud to be an equal opportunity organization. We celebrate it, we support it, and we thrive on it for the benefit of our employees, our consumers, and our community.