

## DUTY STATEMENT

### ASSOCIATE GOVERNMENTAL PROGRAM ANALYST

OUR VISION			
All Californians living in homes they can afford			
OUR MISSION			
Investing in diverse communities with financing programs that help more Californians have a place to call home			
EMPLOYEE INFORMATION			
Employee's Name		Effective Date	
Classification <b>Associate Governmental Program Analyst</b>		Position Number <b>693-001-5393-901</b>	
Division/Section/Unit <b>Multifamily Programs Division/Asset Management Section</b>		Location <b>Sacramento, CA</b>	
CBID <b>R01</b>	Work Week Group <b>2</b>	Tenure <b>Permanent</b>	Time Base <b>Full-Time</b>
Immediate Supervisor		Supervisor's Classification <b>Housing Finance Officer (Management Services)</b>	
CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS			
<p>This position requires the incumbent to maintain acceptable, consistent, and regular attendance; communicate effectively orally and in writing in dealing with the public and/or other employees; develop and maintain knowledge and skills related to the position's specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to the Agency's policies and procedures regarding attendance, leave, and conduct.</p> <p><b>2 CCR § 172 – General Qualifications, states in pertinent part:</b> The incumbent is expected to possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.</p>			
DIVISION DESCRIPTION			
<p>The Multifamily Programs Division is responsible for the financing and ongoing management of California Housing Finance Agency's (CalHFA) Multifamily lending portfolio and subsidy programs. The division is comprised of two sections—Lending and Asset Management. The Asset Management Section oversees the Agency's portfolio of multifamily loans, including financial reviews, physical inspections, monitoring for compliance with regulatory agreements, and administering rental and operating subsidies.</p>			
POSITION DESCRIPTION			
<p>Under the general direction of the Housing Finance Officer, the Associate Governmental Program Analyst is responsible for monitoring the fiscal management of a wide range of multifamily properties financed by the Agency, keeping the Housing Finance Officer informed of issues affecting or impacting the portfolio, and reporting on progress of work assignments.</p> <p>The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties, commensurate with this classification, as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload. The duties and responsibilities include, but are not limited to the following:</p>			
PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS		
40%	<p><b>Portfolio Management</b> Manages affordable housing developments of assigned portfolio. Conducts analysis of developments' annual audited financial statements to ensure and/or provide results to the Housing Finance Officer (HFO). Calculates the Debt Coverage Ratio and occupancy percentage to determine whether earned surplus cash/residual receipts payments are due to the Agency. Identifies findings and discrepancies</p>		

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	and addresses them with Owner/Agents (O/A) until resolved. Monitors earned surplus/residual receipt funds to be remitted. Maintains all reserves to the minimum required levels. Acts as a point person for the evaluation and verification of all CalHFA maintained impound accounts. Maintains and preserves the asset and provides all findings and recommendations to the HFO. Participates in the closing of deals and receives the assigned project for ongoing oversight. Annually reviews the property, liability, and earthquake insurance coverage to ensure that Agency requirements are met and follows up with O/A regarding insurance related issues. Evaluates insurance coverage of the assigned portfolio against possible inadequate coverage. Works with the Lending, Legal, and Accounting staff during loan closing process to prepare instructions establishing impound amounts for taxes, insurance, and other escrows for the property. Reviews submitted replacement reserve requests, ensures all requested items are allowed, and collaborates with the Housing Finance Inspector to verify scope of work and licensed vendors.
20%	<p><b><u>Budget Management</u></b></p> <p>Monitors the submission of the annual operating Budget for the assigned portfolio. Reviews and verifies proposed annual operating budgets, utilizing comparison data, property's own operating history, and current industry standards. Identifies inconsistencies and denies the operating budget, and requests revisions until approved. Reviews Capital Improvement Projections and the Annual Replacement Reserve monthly deposits for developments for preventative maintenance</p>
15%	<p><b><u>Compliance</u></b></p> <p>Verifies units are occupied by tenants who meet income and rent restrictions established in the regulatory agreement. Ensures compliance with California Debit Limit Allocation Committee (CDLAC) resolutions, CalHFA Regulatory Agreement, Mental Health Services Act (MHSA), Special Needs Housing Program (SNHP), and/or School Facility Fee Reimbursement (SFFR) programs for assigned portfolios. Works with O/A to ensure annual certification from the borrower has been received and all affordability requirements are met, and forwards the information to required agencies for review and approval.</p>
10%	<p><b><u>Portfolio Analysis</u></b></p> <p>Assists the HFO with in-depth studies and analyses of special problems or situations effecting the portfolio and works with Multifamily Lending Team, Office of General Counsel, and Financing Division to resolve troubled properties and loans. Collects and analyzes quarterly or monthly financial reports from the developers/sponsors and, if potential problems are identified, works with the HFO and O/A to develop a plan for resolution and makes recommendations to the Deputy Director. Collaborates with the HFO to implement guidelines and monitor progress until the property is operationally sound. Attends meetings with the Asset Management Team to brainstorm, provide updates, and share various information.</p>
10%	<p><b><u>Data Analysis</u></b></p> <p>Analyzes information and situations accurately, draws sound conclusions, and takes effective action. Establishes and maintains cooperative working relationships with internal and external parties, and communicates effectively, both orally and in writing. Updates the Asset Management software and database system and responds to internal and external request for portfolio related information.</p>
<b>PERCENTAGE OF TIME</b>	<b>MARGINAL FUNCTIONS</b>
5%	Participates in staff meetings, attends training, provides work status reports, handles special projects, and performs other duties as assigned within the scope of the current classification.
<b>PERSONAL CONTACTS</b>	
<ul style="list-style-type: none"> <li>Regular contact with representatives from other Federal, State and County agencies; multifamily owners, management agents, resident managers, property tenants, representatives from other state housing agencies, multifamily housing partners, and software vendors.</li> </ul>	

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<b>SPECIAL REQUIREMENTS</b>		
<ul style="list-style-type: none"> <li>Overtime may be required</li> </ul>		
<b>WORK ENVIRONMENT</b>		
<ul style="list-style-type: none"> <li>Prolonged sitting</li> <li>Works in a high-rise building</li> <li>Uses a computer keyboard and reads from computer screens several hours a day</li> </ul>		
<b>PHYSICAL ABILITIES</b>		
<ul style="list-style-type: none"> <li>Ability to transport up to 20 lbs.</li> </ul>		
<b>TRAVEL</b>		
<ul style="list-style-type: none"> <li>Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)</li> <li>Travel may include overnight stay</li> </ul>		
<b>EMPLOYEE ACKNOWLEDGEMENT</b>		
<p>I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with Human Resources.)</p>		
Employee Name	Employee Signature	Date
<b>SUPERVISOR ACKNOWLEDGEMENT</b>		
<p>I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.</p>		
Supervisor Name	Supervisor Signature	Date