



## DUTY STATEMENT ASSOCIATE GOVERNMENTAL PROGRAM ANALYST

<p><b>OUR VISION</b> All Californians living in homes they can afford</p> <p><b>OUR MISSION</b> Investing in diverse communities with financing programs that help more Californians have a place to call home</p>			
<b>EMPLOYEE INFORMATION</b>			
Employee 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/Loan Administration</b>		Location <b>Sacramento, CA</b>	
CBID <b>R01</b>	Work Week Group <b>2</b>	Tenure <b>Permanent</b>	Time Base <b>Fulltime</b>
Immediate Supervisor		Supervisor Classification <b>Staff Services Manager I</b>	
<b>CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS</b>			
<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>			
<b>DIVISION DESCRIPTION</b>			
<p>The Multifamily Programs Division provides loans that facilitate the development, rehabilitation, and preservation of affordable housing projects by partnering with localities as well as for-profit and nonprofit developers.</p>			
<b>POSITION DESCRIPTION</b>			
<p>Under the direction of the Staff Services Manager I, the Associate Governmental Program Analyst serves as the lead and independently performs the technical and analytical work necessary to facilitate loan closings and processes disbursement requests on multifamily rental projects.</p> <p>The duties contained in this job description reflect general details a 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>			
<b>PERCENTAGE OF TIME</b>	<b>ESSENTIAL FUNCTIONS</b>		
50%	<p><b>Multifamily Loan Processing</b> Reviews the more complex loan applications to verify the necessary information is provided, ensures site control and appropriate zoning information are included, and confirms the application is complete. Serves as the point person to process loans for private sector professionals ranging from for-profit and non-profit businesses, law firms, title companies, and construction related businesses. Serves as a liaison to facilitate the loan closing process between Multifamily, Financing Division, Fiscal Services Division, Office of General Counsel, and Asset Management in the Agency. Sets up Secure Send with Borrower and uploads project application files into the document management system. Follows up</p>		

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	<p>with the borrower, to obtain due diligence items and any additional information and reports requested by the Project Officer. Attends and participates (to discuss project scope of work, organization structure and environmental issues) in the initial Concept Meeting. Reviews third-party reports for accuracy, completeness, and logical conclusions. Ensures that third-party reports comply with Agency requirements and standards. Provides information on Multifamily Programs to prospective borrowers and directs substantive program inquiries to the appropriate party. Provides back up for the Project Officer or Specialist as needed.</p> <p>Reviews and corrects draft commitment letters and escrow instructions prepared by legal staff for projects and works with the Deal Team to ensure the final documents are an accurate representation of the deal approved by senior management and/or the Board of Directors. Coordinates the loan closing for the Project Officer and schedules meetings, as necessary, to ensure timely communication between all parties. Attends and participates in all meetings and conference calls among Agency staff, borrowers, and borrower's counsel to identify problems, workout deal points and facilitate the closing process. Maintains and communicates timelines and deadlines to the Project Officer prior to the commencement of the loan closing process. Communicates with all parties in the Development Team, including the borrower's project manager, the borrower's attorney, and any other relevant parties to discuss the closing process and the rest of the Deal Team. Updates the Division's program specific checklists, processes, and procedures by updating or requesting the documents to ensure they are current and shared as directed. Reviews preliminary title reports and underlying title exceptions to identify items which may affect the Agency's security interests and ensures changes requested by the Project Officer and Legal are incorporated into the final title report. Trains other Loan and/or Disbursement Administrators, as assigned.</p>
25%	<p><b><u>Database and Document Management</u></b></p> <p>Continuously updates and edits the Multifamily Database once the project and/or disbursement is assigned, after loan closing. Uploads project files into the document management system. Performs post-closing loan audits on project files to verify that all necessary documentation is received from the title and escrow companies on a timely basis.</p>
10%	<p><b><u>Disbursement Review and Approval</u></b></p> <p>Processes various types of complex loan disbursements from loan closing to project completion and occupancy on multifamily construction and rehabilitation projects. Reviews the submitted draw request and the supporting documentation required for each disbursement.</p> <p>Reviews loan documents and Project Officer directives for specific project funding conditions. Keeps the Project Officer updated of any issues or areas of concern. Works with title companies to obtain necessary endorsements. Works with Prevailing Wage and Davis Bacon Monitors to obtain reports. Works with TCAC, CDLAC, California Housing and Community Development (HCD), and other state agencies to complete multifamily projects. Balances the project draw spreadsheet to borrower's spreadsheet and CalHFA systems of record. Communicates on an ongoing basis with CalHFA Inspectors and Deal Teams for further documentation and clarification, as needed, from pre-close to project completion.</p> <p>Prepares the Disbursement Authorization Form and obtains approvals from upper management, then submits to Accounting to process the wire within the agreed upon timeline. Tracks completion and delivery schedule for the project. Ensures all documentation necessary for the construction draw file has been received, executed, and complete.</p>
10%	<p><b><u>Compliance with Other State and Federal Agency Requirements</u></b></p> <p>Works with other Agency staff to ensure that processing requirements necessary for tax-exempt bonds,</p>

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	such as the Tax Equity & Fiscal Responsibility Act (TEFRA) and CDLAC process, or Federal Housing Administration (FHA) Risk-Share program, are completed in a timely and accurate fashion. Coordinates with developers and other Agency staff to complete the CDLAC application, with the assistance of the Project Officer, so that the necessary approvals are in place before the project is approved by the Board of Directors. Provides technical assistance to the borrower with FHA, Housing and Urban Development (HUD), and the Risk Share Insured Federal Financing Bank (FFB) program (such as, filling out appropriate forms, explaining the process and following up with the borrower for HUD related programs).	
<b>PERCENTAGE OF TIME</b>	<b>MARGINAL FUNCTIONS</b>	
5%	Participates in staff meetings, attends on and off-site training sessions and conferences, provides work status reports, and handles special projects and other duties as required within the scope of the assigned classification.	
<b>PERSONAL CONTACTS</b>		
<ul style="list-style-type: none"> <li>Frequent contact with the business partners, the public, all levels of Agency staff, as well as representatives from other State and county agencies</li> </ul>		
<b>SPECIAL REQUIREMENTS</b>		
<ul style="list-style-type: none"> <li>N/A</li> </ul>		
<b>WORK ENVIRONMENT</b>		
<ul style="list-style-type: none"> <li>Occasional overtime</li> <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>		
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.)		
Employee Name	Employee Signature	Date
<b>SUPERVISOR ACKNOWLEDGEMENT</b>		
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.		
Supervisor Name	Supervisor Signature	Date