

DUTY STATEMENT

Associate Governmental Program Analyst

Employee's Name				Effective Date	
Classification Associate Governmental Program Analyst (AGPA)				Division/Section/Unit Multifamily Programs / Multifamily Lending	
Immediate Supervisor				Supervisor's Classification Staff Services Manager I	
CBID R01	Class Code 5393	Work Week Group 2	Time Base Perm/FT	Location Sacramento	
<i>CalHFA's mission investing in diverse communities with financing programs that help more Californians to have a place to call home.</i>					
DIVISION DESCRIPTION and POSITION SUMMARY <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 – Multifamily Lending and Asset Management. Multifamily Lending provides loans that facilitate the development, rehabilitation and preservation of affordable housing projects by partnering with localities as well as for-profit and non-profit developers. The Multifamily division also leverages, or increases the purchasing power of, other funding sources, including funds from other state agencies, allocations from the California Debt Limit Allocation Committee (CDLAC) and the California Tax Credit Allocation Committee (TCAC).</p> <p>Other Methods of leveraging funding sources include: Providing conduit financing to encourage the construction and rehabilitation of multifamily housing, originating loans underwritten with subsidies funded by the Federal Government or using funding approved by voter initiative. Multifamily provides funding for the preservation of California's affordable rental housing stock, housing with supportive services for the developmentally disabled, as well as permanent housing and services for the chronically mentally ill homeless through innovative programs.</p> <p>Under direction of the Staff Services Manager I, the Associate Governmental Program Analyst (AGPA) performs technical and analytical work necessary to facilitate loan closings and process disbursement requests on multifamily rental projects. This position requires knowledge and a general understanding of multifamily loan underwriting that includes the following: the loan application and closing process, the funding and progress draw process, construction costs, accounting principles, construction close out procedures, loan documents, escrow instructions, and spreadsheet preparation. The duties and responsibilities include, but are not limited to the following:</p>					
<i>Conduct, Attendance and Performance Expectations</i>					
<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>2 CCR § 172 – General Qualifications, states in pertinent part: 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 the 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>					
<i>Percent of Time</i>		<i>Activity</i>			
		ESSENTIAL FUNCTIONS			

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50%	<p><u>Multifamily Loan Processing:</u></p> <p>Reviews the initial loan application to verify the necessary information, including site control and appropriate zoning information are included and that the application is complete. Serves as the point person for private sector professionals ranging from for-profit and non-profit businesses, law firms, title companies, and construction related businesses. The AGPA also serves as a liaison between Multifamily and the Finance, Fiscal Services, Legal and Asset Management divisions in the Agency. Responsible for setting up Secure Send with Borrower and uploading project application files into the document management system. Follows-up with the borrower, to obtain due diligence items and any additional information and reports requested by the Project Officer. Attends and participates (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.</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.</p> <p>Prior to the commencement of the loan closing process, the AGPA 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. In particular, timing and deadlines are maintained and communicated to the Project Officer and the rest of the Deal Team. Assists the department with 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.</p>
20%	<p><u>Disbursement Review and Approval:</u></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 that particular 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. Participates in meetings and telephone calls throughout the loan process. 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. Track completion and delivery schedule for the project. Ensure all documentation necessary for the construction draw file has been received, executed, and complete.</p>
15%	<p><u>Database and Document Management:</u></p>

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10%	<p>Responsible for continuously updating and editing the Multifamily Database once the project and/or disbursement is assigned to them and after loan closing. Responsible for uploading project files into the document management system. Assists the department with program specific checklists, processes and procedures by updating or requesting the documents to ensure they are updated and shared as directed. 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> <p><u>Compliance with Other State and Federal Agency Requirements:</u> Works with other Agency staff to ensure that processing requirements necessary for tax-exempt bonds, 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 (i.e., such as filling out appropriate forms, explaining the process and following up with the borrower for HUD related programs).</p>
5%	<p>MARGINAL FUNCTIONS Provides information on Multifamily Programs to prospective borrowers and direct substantive program inquiries to the appropriate party. Provides back up for the Project Officer or Specialist as needed and assists and trains other Loan and/or Disbursement Administrators as assigned. 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 assigned.</p>
	<p>KNOWLEDGE, SKILLS, AND ABILITIES Additional Knowledge, Skills, and Abilities may be found in the classification specification.</p> <p>Knowledge of the basic functions and organization of the California Housing Finance Agency. In addition, the policies and operations of the California Housing Finance Agency; real estate transactions, including appraisal and property evaluation techniques; the mortgage loan market and basic mortgage loan procedures, especially multi-unit dwelling commercial and conventional loan procedures; methods, principles, terminology used in appraising, buying, selling, financing, leasing, repossessing, and managing real property; factors affecting property values and real estate trends; mortgage credit requirements; local rental markets; and affirmative marketing procedures and policies; construction terminology, understanding of construction documents and related documents: G702/03; Sub Contractor preliminary lien notices, per draw lien waivers, recorded liens and stop notice clearing process, title endorsement types and construction insurance requirements; and accounting basic principles and methods, Real Estate, Real Estate Finance and Property Management Knowledge .</p> <p>Ability to learn and perform the technical aspects of housing finance activities, reason logically to perform a variety of analytical tasks; analyze and present ideas and information effectively both orally and in writing; consult with others on a wide variety of housing finance matters; gain and maintain the confidence and cooperation of those contacted during the course of the work; and perform various calculations with regard to mortgage financing. Analyze data and draw sound conclusions; prepare clear, complete and concise reports; establish and maintain cooperative relationships with others; analyze income property feasibility.</p> <p>In addition, performs research and analytical studies with regard to Agency program operations; develop and present clear, complete and concise proposals with regard to housing finance programs.</p>

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	<p>WORK ENVIRONMENT AND PHYSICAL ABILITIES REQUIRED</p> <ul style="list-style-type: none"> • Work in a high-rise building • Occasional overtime • Occasional travel • Prolonged periods of sitting • Use computer keyboard and read from computer screens several hours a day <p>PERSONAL CONTACTS</p> <ul style="list-style-type: none"> • Frequent contact with the business partners, general public, all levels of Agency staff, as well as representatives from other State and county agencies 	
<p>SUPERVISOR ACKNOWLEDGEMENT:</p> <p>I certify this duty statement represents current and an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.</p>		
Supervisor's Name	Supervisor's Signature	Date
<p>EMPLOYEE ACKNOWLEDGEMENT:</p> <p>I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgement, 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's Name	Employee's Signature	Date
<p>ANALYST'S STATEMENT: I have reviewed this Duty Statement.</p>		
Analyst's Name	Analyst's Signature	Date