



GAVIN NEWSOM
GOVERNOR

STATE OF CALIFORNIA
GOVERNOR’S OFFICE OF BUSINESS AND ECONOMIC DEVELOPMENT (GO-BIZ)

POSITION DUTY STATEMENT

Classification Title Management Services Technician	Unit Community and Local Equity Grants	Name
Working Title Grant Assistant	Position Number 373-108-5278-901	Effective Date

GENERAL STATEMENT

The Management Services Technician will receive direct supervision from a Grant Supervisor within the Community and Local Equity Grants Unit. The Management Services Technician is responsible for a wide range of the less technical, semiprofessional, programmatic and clerical tasks related to the grant programs administered by the Community and Local Equity Grants unit, which consists of the California Community Reinvestment Grants program and the Cannabis Equity Grants program for Local Jurisdictions.

- ESSENTIAL FUNCTIONS**
- | | |
|------------|---|
| 50% | <ul style="list-style-type: none"> • Conduct technical reviews of grant applications to confirm compliance with programmatic requirements and verify applicant eligibility, including their statuses with various federal and state departments, such as the Internal Revenue Service, the Franchise Tax Board, the California Secretary of State, and California Attorney General’s Office. • Review invoices and supporting documentation for requests for payment from grantees and make recommendations and determinations if the documentation is consistent with grant program requirements. • Assist with the review and evaluation of grantee progress reports, document grantee progress and verify compliance with programmatic requirements and the terms and conditions of grant agreements. • Assist with the coordination and execution of site visits and meetings with grantees to review progress and to provide technical assistance. • Assist with the review and evaluation of the least complex grant applications, including completing evaluation forms and scoring grant applications based on programmatic criteria. • Prepare and process travel expense claims for unit staff. |
|------------|---|

25%	<ul style="list-style-type: none"> • Schedule meetings and calls between unit staff (staff meetings) and various stakeholders, including job candidates, grant applicants and grant recipients. • Schedule webinars, arrange conference calls, and book in person and virtual meeting rooms. • Assist with the preparation and dissemination of various program materials, type and format memos, letters and other documents, and provide general clerical support. • Respond to inquiries as the primary Community and Local Equity Grants unit telephone receptionist and receive and respond to general unit inquiries. • Store and organize documents and files in an electronic filing system. • Ensure records are retained in accordance with applicable unit retention policies. • Update and maintain electronic listserv. • Coordinate acquisition and arrangement of employee equipment and workspace accommodations and supplies (cubicle set up, computer, phone, office equipment, and supplies, etc.) and prepare other related paperwork. • Support the compilation of various reports to internal and external stakeholders. • Complete unit staff registrations and paperwork for travel, training, and conferences. • Prepare and process travel expense claims for unit staff.
20%	<ul style="list-style-type: none"> • Assist in the development and processing of grant agreements and amendments for the unit. • Process and monitor the status of various administrative documents including grant requisitions in Fi\$cal, grant invoices, and payment approval labels. • Set up interviews and prepares documents for recruitments in the unit, conducts reference checks.
5%	Other duties as assigned.

SUPERVISION EXERCISED
None.

SUPERVISION RECEIVED
This position reports to a Grant Supervisor within the Community and Local Equity Grants Unit, but may also receive guidance, assignments and supervision from the unit's other Grant Supervisor(s), the Assistant Deputy Director, and the Deputy Director.

PUBLIC AND INTERNAL CONTACTS
During the course of work, the incumbent has regular and frequent contact with state and local governmental agencies, non-profit organizations, local health departments, stakeholders and the public. These contacts require a high degree of sensitivity and awareness of the functions and interrelations of various government, private organizations, stakeholders and the media.

CONSEQUENCE OF ERROR

It is imperative that the incumbent is tactful at all times when dealing with management, other staff, incoming calls and visitors. Lack of tactfulness could result in disciplinary actions against incumbent.

CERTIFICATION

This duty statement fairly represents actual responsibilities, duties performed and reporting relationship of the position. If any aspect of this statement is substantially changed, a new statement will be prepared and submitted to the Personnel Office.

I have read and understand the duties listed above and can perform them either with or without reasonable accommodation. Reasonable accommodation needs should be discussed with your hiring supervisor. If you are unsure whether you require reasonable accommodation, please inform your supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.

Employee's Signature:

Management Services Technician	Date

Employee's Printed Name:

--

Supervisor's Signature:

Grant Supervisor, Community and Local Equity Grants Unit	Date

Supervisor's Printed Name:

--

DESIRED KNOWLEDGE AND SKILLSKnowledge of:

- Proper spelling, grammar, punctuation, and sentence structure for the English language to ensure that prepared and/or reviewed written materials are complete and accurate
- Proper filing techniques to create and maintain an organized series of necessary files to store and retrieve electronic/hardcopy information
- Office procedures (e.g., filing, answering telephones, receptionist duties, supply/equipment ordering, etc.) to perform daily assigned duties
- Modern office methods
- Supplies and equipment
- Business English and correspondence

- Principles of effective training

Ability to:

- Perform difficult clerical work, including ability to spell correctly
- Make arithmetical computations
- Operate various office machines and digital applications/platforms
- Follow oral and written directions
- Evaluate situations accurately and take effective action
- Read, write, and speak English at a level required for successful job performance
- Make clear and comprehensive reports and keep difficult records
- Meet and deal tactfully with the public
- Apply specific laws, rules and office policies and procedures
- Prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling
- Communicate effectively
- Provide functional guidance
- Maintain high ethical standards in completing all assignments and projects
- Work independently, taking initiative, and follow through with projects that have been started