



GAVIN NEWSOM  
GOVERNOR

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

**POSITION DUTY STATEMENT**

<b>Classification Title:</b> Staff Services Manager II (Supervisory)	<b>Unit:</b> Small Business Finance Center	<b>Name:</b>
<b>Working Title:</b> Small Business Finance Center Manager	<b>Position Number:</b> 373-106-4801-001	<b>Effective Date:</b>

**GENERAL STATEMENT:**  
Under the direction of the Chief Deputy Executive Director for the California Infrastructure and Economic Development Bank (IBank), this manager position will manage the Small Business Finance Center (SBFC) Programs and its staff, with assistance from the Chief Compliance Officer and the Executive Director. The position requires the incumbent to display initiative to identify and implement solutions to complex issues. The Manager must take effective courses of action, control and isolate problems while maintaining attention to detail, and attain short-and-long-term objectives of the Small Business Finance Center Programs. The duties include, but are not limited to:

**ESSENTIAL FUNCTIONS:**

<b>20%</b>	Directly supervises subordinate staff. Monitors and evaluates staff performance, directs day-to-day activity, coordinate and manage workflow, assign work, complete performance evaluations and initiate disciplinary action when necessary. Trains and assists staff in the evaluation and approval of documentation presented to the SBFC and enforces compliance and eligibility within IBank SBFC Programs such as the Small Business Loan Guarantee Program (SBLGP), Export Finance Program, Farm Loan Program, Disaster Relief Guarantee Program, and other SBFC Programs existing now or in the future. Leads staff in planning, developing, organizing and implementing new programs or enhancement of existing SBFC Programs and State Small Business Credit Initiative (SSBCI).
<b>20%</b>	Functions in the lead capacity, as an expert in finance and lending, to serve as the primary liaison to communicate with various stakeholders, lenders, and Financial Development Corporations (FDC’s) to provide initial guidance on SBFC Programs, answer inquiries, seek input and feedback, and collect data; conducts final analysis of subordinate staff research on SBFC Program related issues and provide recommendations to the Chief Deputy Executive Director, Chief Compliance Officer, Chief Credit Officer, and Executive Director for executive management decisions; develops, updates and maintains various program reports, policies and procedures; reviews and analyzes loans and claims for approval in the SBLGP and SSBCI Programs and other SBFC programs yet to be developed. Evaluates loan and claim activity to ensure adherence to state and federal laws

	and Board approved directives and requirements. Makes decisions as to the acceptance or denial of approval requests under SBFC Programs.
<b>20%</b>	Represents IBank as a subject matter expert for the interpretation of compliance and eligibility within State and Federal statutory authority, policies and procedures, and Board approved directives and requirements in regard to SBFC Programs; Directs staff for special research-oriented projects on topics that affect the direction of IBank SBFC Programs, and prepares written analysis and recommendations to the Chief Deputy Executive Director, Chief Compliance Officer, Chief Credit Officer, and Executive Director for executive management and Board approval for proposed program improvements, projects and awards. Collaborates with Financial Development Corporations, stakeholders, consultants and other participants to obtain and verify data and other information for these written analyses and recommendations. Interprets new and amended directives and requirements to apply program and administrative procedures.
<b>15%</b>	Conducts statistical analysis of loan and lender portfolios. Prepares annual reports to the Governor and Legislature; develops interagency agreements, contracts, and public/private partnerships. Develops, produces, and presents regular marketing, outreach, and education efforts for the SBFC Programs in coordination with the Deputy Director of External Affairs. Represent IBank with regard to small business issues at meetings with officials of local, state, federal agencies, and private firms. Gain and maintain the confidence and cooperation of government agency representatives, local government, community leaders, legislators and others. Make presentations on behalf of IBank at conferences, seminars, workshops, and other public gatherings.
<b>10%</b>	Co-ordinates with IBank staff and others with respect to IBank's various reporting requirements. Assists in the development of databases to enhance the efficiency of data collection and reporting. Track and examines accuracy of program data. Assists the Chief Deputy Executive Director and Chief Compliance Officer in supplying State and federal agencies or others with statistical data as needed.
<b>10%</b>	Develops and updates written procedures for IBank SBFC Programs activities related to eligibility and compliance of credit programs, independently or with the assistance of outside contractors. Delivers updates and changes in the programs to the small business finance center stakeholders.
<b>5%</b>	Perform other job-related duties as required.

#### **SUPERVISION EXCERCISED**

The Staff Services Manager II (Supervisor) supervises professional and administrative staff that performs complex and technical duties in a highly visible and political environment.

#### **SUPERVISION RECEIVED**

This position receives general direction and supervision from the Chief Deputy Executive Director of IBank. This position has broad latitude in planning, organizing, and accomplishing work independently.

#### **PUBLIC AND INTERNAL CONTACTS**

The incumbent has frequent contact with executive, administrative, economic development, marketing and communications staff of GO-Biz, the Administration, the State Treasurer's Office, the Department of Finance, other state agencies, local organizations and local elected and appointed officials, financial development corporations, business owners and executives and municipal finance professionals.

**INITIATIVE AND INDEPENDENCE OF ACTION**

This position requires a high degree of administrative, technical and management capability over extremely sensitive financial assistance transactions and matters. The incumbent is relied upon to develop and ensure the completion of assignments, and delegate work in complex situations without direct supervision. The ability to set and manage priorities, develop policy for all programs and ensure completion of work is required. This position also requires a high level of problem-solving, technical skills, perceptive judgment, independence of action, and accurate assessment of intricate situations.

**CONSEQUENCE OF ERROR**

The Staff Services Manager II (Supervisor) must identify and resolve problems and issues that adversely affect the efficiency and effectiveness of IBank. Any errors in actions may reflect badly and cause embarrassment to IBank, GO-Biz, the Administration and the State of California, and may also lead to potential lawsuits or regulatory action by agencies that oversee the municipal finance transactions. This is a high-profile position for IBank. Error, poor judgment, and the lack of professionalism could result in the loss of significant infrastructure and economic development in California; therefore resulting in termination of employment.

**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 Signature:**

<b>Staff Services Manager II (Supervisory) California Infrastructure and Economic Development Bank</b>	<b>Date</b>

**Employee’s Printed Name:**

**Supervisor’s Signature:**

<b>Chief Deputy Executive Director California Infrastructure and Economic Development Bank</b>	<b>Date</b>

**Supervisor’s Printed Name:**