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GOVERNOR

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

POSITION DUTY STATEMENT

Classification Title: Office Technician (Typing)	Unit: Fiscal & Administrative	Name:	
Working Title: Office Technician	Position Number: 373-105-1139-001	Effective Date:	

GENERAL STATEMENT

As a valued member of the California Infrastructure and Economic Development Bank (IBank) team, you make it possible for IBank to contribute to the State’s economic development and job creation efforts by being innovative and flexible, reporting to work as scheduled, working cooperatively with team members and others, and treating others fairly, honestly and with respect. Your efforts are important to each member of the team, as well as those we serve.

Under the general direction of the California Infrastructure and Economic Development Bank’s (IBank) Accounting Administrator I (Supervisor), the Office Technician (Typing) is responsible for a wide range of clerical tasks associated with IBank’s various financing programs and to provide clerical support to IBank’s executive staff.

This position requires that the incumbent maintain consistent and regular attendance; communicate effectively orally and in writing in dealing with high level elected and appointed officials and their staff, the public and/or other employees; develop and maintain knowledge and skill related to specific tasks, methodologies, materials, tools and equipment; complete assignments in a timely and efficient manner; and adhere to policies and procedures regarding attendance, leave, and conduct.

ESSENTIAL FUNCTIONS

45%	<p>Independently review all incoming IBank correspondence to determine appropriate assignment to the Executive Director, Chief Deputy Executive Director, General Counsel, Chief Credit Officer, Chief Compliance Officer, SBFC Manager, Loan Servicing Manager, Loan Origination Manager, Bond Manager or Fiscal Manager for response and/or other action.</p> <p>Copy, mail, and fax bond and loan applications and various documents, including confidential/sensitive correspondence, and perform mass mailings.</p> <p>Make off-site deliveries of mail and other documents.</p>
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	<p>Monitor several IBank program email boxes and the IBank online application system, route items to the appropriate staff, and store items in an electronic filing system. Serves as primary telephone receptionist and receives general IBank email inquiries, and routes to the staff for response.</p> <p>Greets visitors which includes dignitaries from the Governor’s Office, Legislature members and staff, State and local elected officials, local government officials and their staff, the Governor’s Office of Business and Economic Development (GO-Biz) staff, IBank Board members, the press/media and the general public.</p> <p>Assists candidates interviewing at IBank by scheduling appointments, providing instructions prepared by staff, preparing interview packets, setting up the testing station, instructing candidates how to save test, serve as the applicant-testing timekeeper, and collect required documents from candidates. Establish and maintain databases and/or spreadsheets, which contains financial data, statistical data, and mail/contact lists.</p> <p>Create PDF documents from Microsoft Office Suite documents. Write Office Technician related procedures, update procedures, and maintain a current desktop procedure binder. Prepare, proofread, and edit routine and technical correspondence for format, content, and grammar.</p> <p>Maintain supply, printer and copy areas and track office supply inventory and generate reorders. Schedule meetings, arrange conference calls and book conference rooms. Process time sheets and personnel forms through GO-Biz. Arrange with outside vendors, subject to review and approval of the Accounting Administrative I (Supervisor), for maintenance of standard office equipment.</p> <p>Perform initial set-up and maintenance of bond, loan, guarantee, and accounting files. Make hard copies of bond closing document transcripts, and maintain log of transcript status.</p> <p>Establish and maintain the California Financing Coordinating Committee Funding Fair reservation list and receive telephone, email, fax, and U.S. mail inquiries about the Funding Fairs. Follow-up with emails, confirming reservations, and prepare reports for management review.</p> <p>Assist staff with the review of program files and review files for a specified list of bond, loan, guarantee and accounting documents.</p> <p>Arrange new employee equipment and workspace accommodations and supplies (cubicle set up including computer, phone, office equipment, and supplies, etc.) and prepare other related paperwork.</p>
<p>45%</p>	<p>Maintains documentation file and distribution of revolving fund checks.</p> <p>Process supply orders and requests for services with CalCard and Revolving Fund Check Requests.</p> <p>Maintain invoice records and reconcile CalCard invoices.</p>

	<p>Responsible for the preparation of annual bond fee invoices, monitor receipt of payments, update invoice logs and receipt all IBank invoices for payment in FISCal.</p> <p>Provide clerical support for IBank Board related duties including: manage agenda preparation and dispersal; post agenda to IBank website and email/mail agenda to individuals on board meeting distribution list; reserve and prepare meeting room for board meetings; and, arrange for and oversee audio equipment.</p> <p>Prepare and deliver board member briefing packets and make board member briefing appointments. Prepare initial draft of board minutes from audio tape of meeting for management review, and maintain official minute book and board resolution binder.</p> <p>Complete staff registrations and paperwork for in-state travel, training and conferences. Make, air, car and hotel travel arrangements for staff. Prepare and process travel expense claims for staff. Prepare itineraries for traveling staff. Establish and maintain a log of outreach contacts of staff.</p>
5%	<p>Establish and maintain IBank administrative and support contract files for IBank contracts such as leases and outside consultants. Compile a variety of reports including GO-Biz reports and submit completed reports to Executive Director and GO-Biz. Maintain program activity tracking systems, databases and reports. Prepare legislative update reports. Process and maintain record retention schedules.</p>
5%	<p>Assist staff with any miscellaneous administrative tasks. Other duties as assigned.</p>

SUPERVISION EXERCISED

The Office Technician does not provide direct supervision.

SUPERVISION RECEIVED

The Office Technician (Typing) will receive direct supervision from the Accounting Administrator I (Supervisor). The incumbent is expected to exercise individual initiative, utilize goal setting, possess a strong work ethic, be punctual, organized, manage multiple priorities and meet deadlines.

PUBLIC AND INTERNAL CONTACTS

There is significant contact with internal staff, GO-Biz staff, Board members and their staff, other State and local agencies and representatives of borrowing entities.

INITIATIVE AND INDEPENDENCE OF ACTION

This position requires a high degree of administrative and technical capability over extremely sensitive financial assistance transactions and matters. The incumbent is relied upon to develop and ensure the completion of assignments. The ability to set and manage priorities, develop policy for all programs and ensure completion of work is required. This position also requires problem-solving, technical skills, perceptive judgment, independence of action, and accurate assessment of intricate situations.

CONSEQUENCE OF ERROR

Delays, mistakes, or errors in judgment can lead to inaccurate information, loss of credibility, misuse of State funds and the loss of critical assistance to California businesses and communities.

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:

Office Technician (Typing) California Infrastructure and Economic Development Bank	Date

Employee's Printed Name:

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Supervisor's Signature:

Accounting Administrator I (Supervisor) California Infrastructure and Economic Development Bank	Date

Supervisor's Printed Name:

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