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| **PART A** | | |
| **Position No: 321-001-5157-XXX** | | **Date:** |
| **Classification:** Staff Services Analyst | | **Name:** |
| Under the direct supervision of the Staff Services Manager I and direct/general supervision of the Staff Services Manager II, this position will assist in administering, developing and implementing various programs, policies and operating procedures of the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA or the Authority). | | |
| **Percentage of time performing duties** | **ESSENTIAL FUNCTIONS** | |
| 30% | Assists in performing complex analyses involved with various financing mechanisms including applications for the Sales and Use Tax Exclusion (STE) program. Conducts analysis of applications and program documents to ensure compliance with statutory authority, regulations, and policies. Obtains additional information about prospective participants from applicants and other sources, including other government agencies. Details eligibility of proposed projects by writing staff summaries for CAEATFA board consideration and approval and presents project recommendations to the board. Assists in monitoring reporting activities with respect to applicants, lenders, and participating parties to ensure regulatory compliance, and monitors and reviews annual and semi-annual reports. | |
| 25% | Acts as a liaison with STE applicants, other government entities, consultants, lending institutions, program participants, and stakeholders and answers inquiries. Assists with the research and analysis of program-related issues and provides recommendations to management. Assists with the development and maintenance of various program reports and policies and procedures. Assists with program marketing and outreach efforts and collaborates with other state agencies to promote program growth. Assists with the arrangement of internal meetings and meetings with stakeholders to describe programs fully and encourage program activity. Assists with conducting reconciliation and performs additional tasks to assure legal, regulatory, and contractual compliance. Prepares regulatory agreements and amendments as necessary for execution by the Executive Director and STE applicants following the passing of a resolution by the CAEATFA board. | |
| 15% | Assists with drafting regulations and presentation materials and conducts public workshops to solicit input from stakeholders and identify key programmatic objectives and hurdles. Makes recommendations to management and participates in the program development and rulemaking processes. Assists by performing independent and special research on related topics which affect the programs of the Authority, including involvement on various Authority task force teams researching various issues (policy and administrative). | |
| 15% | Assists in providing technical information and assistance to other technical and clerical staff related to various applicants, program participants, other State agencies, the Legislature, and members of the banking, insurance and investment community and other external stakeholders. Assists in conducting statistical analysis of program activity and portfolios. Assists in developing and updating written procedures for Authority program activities, STE transactions, and general office operations. May assist with monitoring and the preparation of documentation for title conveyance agreements, analyzing and processing claims, reviewing contract invoices, and bond sales and closings. | |
| 10% | Assists in the preparation and management of contracts and amendments and other various contract-related documentation and reports; makes recommendations concerning contract terms and task order preparation to management; assists with the preparation of RFPs/RFQs and coordinating activities associated with consultant selection process; and ensures compliance with program regulations. | |
| 5% | Performs other job-related duties as required in support of CAEATFA’s mission, goals and objectives. May travel in state up to twice a month for one to two days at a time. | |

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| **PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS** | | | | | |
| **Activity** | **Not Required** | **Less than 25%** | **25% - 49%** | **50% - 74%** | **75% or more** |
| **Vision** Review printed and handwritten material, reading computer screen. |  |  |  |  |  |
| **Hearing:** Answer inquiries and provide verbal information to agencies, communities, and public and private sector. |  |  |  |  |  |
| **Speaking:** Answer inquiries and provide verbal information to other employees, agencies, public and private sector. |  |  |  |  |  |
| **Walking:** Distribution of information and copying |  |  |  |  |  |
| **Sitting:** Sitting at desk for long periods of time |  |  |  |  |  |
| **Standing:** Xeroxing or faxing |  |  |  |  |  |
| **Balancing:** |  |  |  |  |  |
| **Concentrating:** Gathering financial/statistical information, preparing analytical reports and documents. |  |  |  |  |  |
| **Comprehension:** Understanding financial and statistical information gathered from various sources |  |  |  |  |  |
| **Working Independently:** Must be able to work independently and under the supervision of the SSM I |  |  |  |  |  |
| **Lifting up to 10 LBS occasionally:** Obtain files and documents |  |  |  |  |  |
| **Lifting up to 20 LBS occasionally and/or 10 LBS frequently:** |  |  |  |  |  |
| **Lifting up 20-50 LBS occasionally and/or 25-50 frequently:** |  |  |  |  |  |
| **Fingering:** Use computer to enter data gathered, and dial telephone. |  |  |  |  |  |
| **Reaching**. Answering telephone and reach for supplies and paperwork. |  |  |  |  |  |
| **Carrying:** Carry documents and files. |  |  |  |  |  |
| **Climbing:** |  |  |  |  |  |
| **Bending at waist:** |  |  |  |  |  |
| **Kneeling:** |  |  |  |  |  |
| **Pushing or pulling:** |  |  |  |  |  |
| **Handling:** Sort and file paperwork |  |  |  |  |  |
| **Driving:** |  |  |  |  |  |
| **Operating equipment:** Computer, telephone, xerox machines, fax. |  |  |  |  |  |
| **Working indoors:** Enclosed office environment |  |  |  |  |  |
| **Working outdoors:** |  |  |  |  |  |
| **Working in confined space:** Enclosed office environment |  |  |  |  |  |

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| **PART B**  **PROSPECTIVE EMPLOYEE RESPONSE** | | | |
| **Position No: 321-001-5393-002** | | **Date:** | |
| **Classification: Associate Governmental Program Analyst** | | **Name:** | |
| Do you have any physical or mental condition or limitation that will prevent you from performing the essential functions of the position as described above? | | | |
|  | No. I have no physical or mental condition or impairment that would prevent or otherwise impair me from performing the essential functions of the job, as set forth in the job description above. | | |
|  | No. I do have a physical or mental condition or limitation that will require reasonable accommodation in order for me to be able to perform one or more of the essential functions of the job, as set forth in the job description above. | | |
|  | Yes. I have a mental or physical condition or limitation that will prevent me from performing one or more of the essential functions of the job, as set forth in the above job description even with reasonable accommodation. | | |
|  | I am not sure if I have any physical or mental condition or impairment that might prevent or otherwise impair me from performing one or more of the essential functions of the job, as set forth in the above job description. | | |
| **Note:** If you have checked this box, please indicate in the space below the following information:  1. the essential function in question, and  2. the specific functional limitations you have that you believe may prevent or otherwise impair you from performing that essential function. | | | |
| You may attach additional pages if necessary. A Personnel Office representative will contact you in order to discuss the matter with you in greater detail. If during this conversation it is determined that a reasonable accommodation may be necessary in order for you to perform the essential function(s) of the job, the representative will discuss that option with you. | | | |
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| **CERTIFICATION:** I certify that I have provided true and complete information concerning my ability to perform the essential functions as it pertains to above job description. (Any misrepresentation or material omission may be cause for dismissal.) | | | |
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| Applicant’s Signature | | | Date Signed |