

## DUTY STATEMENT

### Research Data Analyst I

Employee's Name <b>OPEN VACANCY</b>				Effective Date <b>December 2018</b>
Classification <b>Research Data Analyst I</b>				Division/Section/Unit <b>Financing &amp; ERM</b>
Immediate Supervisor <b>Financing Officer</b>				Supervisor's Classification <b>Financing Officer</b>
CBID R01	Class Code 5729	Work Week Group 2	Time Base Full Time	Location Sacramento, CA

It is CalHFA's mission to create and finance progressive housing solutions so more Californians have a place to call home.

#### **DIVISION DESCRIPTION and POSITION SUMMARY**

The Financing Division is responsible for the Agency's financing and investment activities. The division plans and supervises bond and note sales, issues and manages outstanding bonds and other debt obligations, and provides continuing disclosure and financial reporting to bond investors. Financing also manages financial agreements related to variable rate debt including interest rate swap contracts, liquidity agreements and remarketing agreements. In addition, the division also manages the short term and long term investments of Agency funds, manages CalHFA's loan financing commitment pipeline, and provides general financial and investment advice to the Executive Director, the CalHFA Board of Directors and stakeholders.

Under the direct supervision of the Financing Officer within the California Housing Finance Agency's Financing Division, the incumbent performs basic research, data gathering and statistical work on matters related to CalHFA's ongoing lending programs and financial data. The duties and responsibilities include, but are not limited to the following:

<i>Percent of Time</i>	<i>Activity</i>
35%	<b>ESSENTIAL FUNCTIONS</b> Conducts basic research and data analytics using qualitative and quantitative research methods to support agency single-family loans and multifamily projects on financial policy issues and financial data management. In collaboration with the Financing Officer, determines the Agency's Allowance for Loan Loss and Risk Share reserve requirements. Methods include, but are not limited to statistics, forecasting and financial ratio calculations. Monitors financial outcomes of Agency's single and multifamily programs. Reviews project data to determine development cost, project income, project expense, and replacement reserve use outcomes. Creates and maintains database of project financial outcomes to use as baseline for multifamily underwriting and asset management decisions. Working with the Asset Management and Multifamily Programs division to determine current multifamily projects requiring yield maintenance payment.
20%	Analyzes data from the US Census, Tax Credit Allocation Committee, Department of Housing and Community Development, localities, lenders, and others to further CalHFA policy and lending goals. Examples of projects for which this data will be analyzed include high cost housing studies, determining gap loan needs, reviewing development contingencies, and better understanding locality fee structures.
15%	Data and Information Research – Research what data is currently available in all of the agencies databases and what information Financing could further incorporate into its own databases and reports to improve its business function. Work with various units and members of Financing to determine what data that would be necessary for future business functions that are not currently being captured by the agency, and work with various units to ensure this data is captured. Using Microsoft Excel, Access and Word, and Adobe Acrobat, to produce reports and excel files from CalHFA databases for tracking programs, and reporting to management.
10%	Participates in working groups for special assignments or implementation of new single and multifamily financing programs that may require the use of Word, Excel, Power Point or other

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10%	software applications as needed. Attends seminars, meetings, and conferences to stay current on affordable housing trends and topics.	
5%	<p>Analyze available fund balances and maintain the various Indenture's global reserve position and determine available reserves for redeeming bonds using financial reports and financial statements to verify balances.</p> <p><b>MARGINAL FUNCTIONS</b></p> <p>Keeps up to date regarding Federal and State laws pertaining to housing finance and CalHFA programs and bond indenture requirements.</p> <p>Performs special projects and other duties on initiative or request.</p>	
<p><b>KNOWLEDGE, SKILLS, AND ABILITIES:</b> Additional Knowledge, Skills, and Abilities may be found in the classification specification.</p> <ul style="list-style-type: none"> <li>• Familiar with CalHFA's mission and corporate structure;</li> <li>• Knowledge of CalHFA Multifamily Loan products and mortgage loan procedures;</li> <li>• Knowledge and use of computers and Microsoft Word and Excel products;</li> <li>• Ability to speak and write effectively;</li> <li>• Ability to prioritize, organize, productively manage time, and comply with numerous deadlines;</li> <li>• Ability to work effectively under pressure and comprehend written materials and interpret and apply rules and regulations as needed;</li> </ul> <p><b>WORK ENVIRONMENT AND PHYSICAL ABILITIES REQUIRED</b></p> <ul style="list-style-type: none"> <li>• Prolonged periods of sitting, computer use and typing</li> <li>• Work in a high-rise building with an elevator</li> <li>• Regular phone use and participation in meetings</li> <li>• Establishes and preserves a positive working relationship across all Agency Departments</li> <li>• Assures duties are completed in a professional manner consistent with applicable regulations, policies and ethics rules.</li> </ul> <p><b>The following abilities are for most positions with or without an accommodation:</b></p> <ul style="list-style-type: none"> <li>• <b>VISION</b> – You must have sufficient vision to perform the following duties; prepare various forms; proofread documents; read printed material, read from computer screen, and read handwritten materials.</li> <li>• <b>HEARING</b> – Your hearing must be sufficiently acute to perform following duties: Answer telephones; receive verbal information from outside sources; understand verbal instruction.</li> <li>• <b>SPEECH</b> – You must have sufficient ability to speak to perform following duties: Receive visitors; answer inquiries and provide verbal information or instruction.</li> <li>• <b>BENDING, STOOPING, KNEELING</b> – You must be able to bend at the knee or waist, stoop, and kneel to perform duties: Fill the copier with copy paper.</li> <li>• <b>SITTING OR STANDING</b> – You must be able to sit or stand for extended periods of time to perform the following duties: Attend meetings, tour facilities, sit at a desk for extended periods of time to perform division administrative duties that are mandatory for this position.</li> <li>• <b>CONCENTRATION</b> – You must be able to continuously concentrate to perform the following duties: Review and read records/documents, research, compose, analyze, compile, and update technical documents; multi-tasking; preparing various forms and documents.</li> </ul> <p><b>PERSONAL CONTACTS</b></p> <ul style="list-style-type: none"> <li>• Frequent contact with all levels of Agency staff, and occasionally with representatives from other State or Federal agencies, and/or city and county agencies.</li> </ul>		
<b>SUPERVISOR'S STATEMENT: I have discussed the duties of the position with the employee.</b>		
Supervisor's Name	Supervisor's Signature	Date

Employee's Name		
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EMPLOYEE'S STATEMENT: <b>I have discussed with my supervisor the duties of the position and have received a copy of the Duty Statement.</b>		
Employee's Name	Employee's Signature	Date
ANALYST'S STATEMENT: <b>I have reviewed this Duty Statement.</b>		
Analyst's Name Christina Winchester	Analyst's Signature	Date