

**DUTY STATEMENT  
STATE TREASURER'S OFFICE  
Division: CTCAC**

<b>PART A</b>	
<b>Position No: 342-001-0098-001</b>	<b>Date:</b>
<b>Class: Executive Secretary</b>	<b>Name:</b>
Appointing Authority: State Treasurer as Chairperson Salary: Exempt Level D	
<p>Under the general direction of the State Treasurer as Chairperson, the California Tax Credit Allocation Committee (Committee) administers a federal and state program, which provides hundreds of millions of dollars of investment in affordable rental housing for lower-income families and individuals. Federal and state tax credits, allocated by the Committee, assist in the creation and preservation of affordable housing by enabling affordable housing sponsors to raise project equity through the sale of tax benefits to investors.</p> <p>The Committee also monitors the affordable housing properties to ensure that the beneficiaries of the housing tax credit are providing decent, safe and sanitary housing to income eligible households, restricting rents at the appropriate amounts and meeting the requirements of the federal monitoring regulations.</p>	
Percentage of time performing duties:	<b>ESSENTIAL FUNCTIONS</b>
<b>60%</b>	Provides policy, program, and technical direction to the State Treasurer and the Committee in its purposes, which includes administering two low-income housing credit programs -- a federal program and a state program providing rental housing investors tax credits for low- and lower-income families and individuals; provides technical assistance to state and local government agencies in utilizing the tax credit program; conduct public hearings, reviews and suggests legislative initiatives, answers legislative inquiries; assures compliance with the provisions of the Internal Revenue Code with respect both to underwriting and financial feasibility of proposed projects; interacts with Congressional officials, user groups, legislative members, other state agencies, national syndicators, attorneys, accountants, lenders, local officials and developers.
<b>20%</b>	Participates in national debates on behalf of the Treasurer and the Committee to assure that California's interests are considered as national policy decisions are made; prepares speeches, lectures, or discussions concerning the work of the Committee for presentation at such events; prepares and delivers testimony at public hearings on the roles and functions of CTCAC, and CTCAC'S and the Treasurer's position on particular matters.
<b>20%</b>	Directs CTCAC management staff in carrying out the functions of the Committee; manages the day-to-day operations of the Committee; and establishes the overall priorities of the Committee's workload; manages CTCAC's operational budget.
<b>NON-ESSENTIAL FUNCTIONS</b>	

## PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS

<b>Position No: 342-001-0098-001</b>		<b>Date:</b>			
<b>Class: Executive Secretary</b>		<b>Name:</b>			
Activity	Not Required	Less than 25%	25% to 49%	50% to 74%	75% or More
<b>VISION:</b> Reviews and analyzes policy issues, reports, laws and municipal investment instruments; analyzes legislation; develops articles, issue briefs and agenda items.					X
<b>HEARING:</b> Answers inquiries and providing verbal information; interacts at commission meetings, public hearings, seminars and conferences.					X
<b>SPEAKING:</b> Same as hearing					X
<b>WALKING:</b> Distributing documents; attending meetings and conferences.			X		
<b>SITTING:</b> Sits at desk while performing duties.					X
<b>STANDING:</b> Making presentations at conferences/seminars.			X		
<b>BALANCING:</b>	X				
<b>CONCENTRATING:</b> Reviewing policies and practices of municipal investments; reviewing legislation; reviewing and analyzing public debt matters and governmental investment practices for articles, issue briefs, Commission agenda items.					X
<b>COMPREHENSION:</b> Understanding policies and practices of municipal investments; understanding legislation; understanding public debt matters and governmental investment practices.					X
<b>WORKING INDEPENDENTLY:</b> CEAs work independently					X
<b>LIFTING UP TO 10 LBS OCCASIONALLY:</b> Carrying files		X			
<b>LIFTING UP TO 20 LBS OCCASIONALLY AND/OR 10 LBS FREQUENTLY:</b>	X				
<b>LIFTING UP 20-50 LBS OCCASIONALLY AND/OR 25-50 FREQUENTLY:</b>	X				
<b>FINGERING:</b> Pushing telephone buttons; computer keyboard; calculator				X	
<b>REACHING:</b> Answering telephone; handing documents.				X	
<b>CARRYING:</b> Files or documents		X			
<b>CLIMBING:</b>	X				
<b>BENDING AT WAIST:</b>	X				
<b>KNEELING:</b>	X				
<b>PUSHING OR PULLING:</b>	X				
<b>HANDLING:</b> Processing documents.			X		
<b>DRIVING:</b> To attend meetings, conferences and seminars.		X			
<b>OPERATING EQUIPMENT:</b> Telephone; computer; fax; copier.					X
<b>WORKING INDOORS:</b> Enclosed office environment.					X
<b>WORKING OUTDOORS:</b>	X				
<b>WORKING IN CONFINED SPACE:</b> Enclosed office environment.					X