

**State of California**  
**Business, Consumer Services and Housing Agency**  
**California Department of Housing and Community Development**  
**DUTY STATEMENT**

**Division:** Administration and Management Branch  
**Unit:** Fiscal Management Branch  
**Position Number:** 401-109-4801-905 (PS 1389)  
**Classification:** Staff Services Manager II  
**Working Title:** Financial Services Manager  
**Location:** Sacramento, Headquarters  
**Incumbent:** Vacant  
**Effective Date:** TBD

**Department Statement:** You are a valued member of the Department's team. You are expected to work cooperatively with team members and others to enable the Department to provide the highest level of service possible. Your creativity and ingenuity are encouraged. Your efforts to maintain regular attendance and treat others fairly, honestly, and with respect are critical to the success of the Department's mission.

**Job Summary:** Under the general direction of the Chief Financial Manager (Staff Services Manager III) of the Financial Management Branch, the Staff Services Manager II is responsible for the management and oversight of the Financial Transactions Unit and the Loan Servicing Unit. The incumbent is responsible for managing and oversight of HCD's loan and grant servicing functions and of award, disbursement, and other financial transaction processes for HCDs federal, state, and bond loan and grant portfolio.

<b>% of Time</b>	<b>Essential Functions:</b>
45%	Supervise, plan, and direct the work of units responsible for the implementation of loan and grant servicing and transacting including, principal and interest controls for multiple loan types and terms, budgetary adjustments and allocation system updates, program income system updates, state match system updates, and analyzing and processing encumbrances, payee data records, invoices, and drawdowns. System updates required in Consolidated Automated Program Enterprise System (CAPES), Grant Management System (GMS), Integrated Disbursement and Information System (IDIS), and Financial Information Systems of California (FI\$Cal). Other loan and grant servicing and transacting functions include, but are not limited to, reconveyances, receipts/repayments, loan restructures, payoff demands, invoicing, collection efforts, default reserve payments, and wiring to title companies.
30%	Oversee development of internal controls and processes related to loan and grant servicing and transacting activities. Ensure staff comprehend current and new loan

and grant program and budgetary requirements. Ensure that proper processes and procedures are in place and followed for maintenance of physical records, loan documentation, and corresponding databases. Support the Department's continuous quality improvement process by preparing or reviewing flow charts of key processes within the Financial Management Branch and establishing performance measures. Review and monitor functionality of current financial processes and databases. Provide sound recommendations on alternatives and improvements.

25% Complete probation and annual performance appraisals timely and track all managers to ensure transactions and services are completed and submitted timely. Ensure all hires are equitable and follow a fair selection process. Conduct hiring as needed. Serve as financial representative to ad hoc groups formed to solve financial and administrative problems. Performs other job-related duties as assigned.

**% of Time**      **Marginal Functions:**  
None

**Special Requirements:** (Define all that apply)

**Travel:** Up to 5% of travel may be required.

**Supervision Exercised:** None

**Conflict of Interest (COI):** Form 700 reporting required.

**Background Check:** None

**Live Scan:** None

**Bilingual, specify language:** None

**License/Certification:** None

**Medical Clearance:** None

**Other, please specify:** None

**Physical Requirements:** The position requires the ability to sit, stand, read, communicate and work on a computer for extended periods of time.

**Working Conditions:** The incumbent works in an office setting. Air conditioned, high-rise building with elevator access, cubicle or office with natural and artificial lighting.

**Administrative Responsibility:** The incumbent advises Executive leadership on both specific and general policy issues affecting Departmental programs and will support the Department's capacity to obtain funds to manage programs in support of the Department's mission and policies.

**Personal Contacts:** The incumbent will serve as the main contact between the assigned Housing Policy Development Division activities and a wide variety of internal external stakeholders.

**Consequence of Error:** This position has responsibility to help ensure that the principles and practices of the Division are carried out and implemented in accordance with the Department's mission, policies and procedures, as well as federal, state and local laws. Lack of knowledge, inaccurate work, misunderstanding, poor judgement, or inadequate analyses could result in misleading information being provided to the Department, state and local agencies or create misleading perceptions.

**Diversity, Equity, and Inclusion:** All employees at HCD are expected to uphold the values of diversity, equity, and inclusion (DEI) which includes being committed to fostering an environment in which employees for a variety of backgrounds, cultures, and personal experiences feel welcomed and can thrive. Staff are expected to be respectful of differences, treat other with respect, encourage others to participate, foster innovations, and stay committed to all DEI efforts in the workplace.

**Equal Employment Opportunity:** All HCD employees are expected to conduct themselves in a professional manner that demonstrates respect for all employees and others they come in contact with during work hours, during work-related activities, and anytime they represent the Department. Additionally, all HCD employees are responsible for promoting a safe and secure work environment, free from discrimination, harassment, inappropriate conduct, or retaliation.

*I have read and understand the duties and requirements listed above and am able to perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation may be necessary, or if unsure of a need for reasonable accommodation, inform the hiring supervisor.)*

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

*I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties and have provided a copy of this duty statement to the employee named above.*

Supervisor Name: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

\*Please return the signed original duty statement to the Human Resources Branch to be filed in the Official Personnel File.