

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

PART A	
Position No: 342-001-5393-050	Date:
Classification: Associate Governmental Program Analyst	Name:
Under the general direction of the Staff Services Manager II and Program Manager I, this traveling position performs detailed reviews of compliance issues affecting all multifamily rental housing projects throughout California that are funded with the Low Income Housing Tax Credit (Internal Revenue Code Section 42) and other related analytical duties.	
Percentage of time performing duties	ESSENTIAL FUNCTIONS
50%	Audits, analyses and assesses the more complex and technical project files for compliance with the Low Income Housing Tax Credit program as determined by the Internal Revenue Code Section 42 and state law. Conduct physical inspections of units to determine habitability per Uniform Physical Condition Standards. Research and record changes in LIHTC program requirements from year to year to apply the correct regulations to projects in both the federal compliance period and the state extended use period. Determine corrective action as necessary and report findings to the IRS. Communicate with project owners and managers by phone, written correspondence or conference on issues of noncompliance and the steps that need to be taken to correct. Track progress of owner attempts to rectify noncompliance.
25%	Receive and monitor the submission of required documentation from property owners whose projects are determined to be out-of-compliance with Internal Revenue Code Section 42 requirements. Update database, file, and apprise supervising manager on the current state of the assigned portfolio. Prepare status reports, spreadsheets, close out letters, and attachments for 8823 filings. Notify manager when deadlines for submission of required documentation have lapsed.
15%	Conduct various research projects independently or as directed. Responsible for 1-3 ongoing project(s) in addition to the general monitoring requirement. Conducts all research, monitoring, correspondence, and tracking with regards to the project as well as keeping management apprised of the status on a monthly basis. Must maintain a knowledge base on the project to be able to present to upper management, conduct training for peers, and present the information to owners, management agents, investors, and other stakeholders.
5%	Respond to the more complex and technical inquiries from various interested parties (managers, owners, other government agencies, appraisers, developers, nonprofit organizations etc.) by phone, written correspondence or conference, the policies of the Committee and the regulations of Section 42 as they relate to State and Federal program requirements.
Percentage of time performing duties	NON-ESSENTIAL FUNCTIONS

5%	Assist with the processing of public and statistical information requests. Assist or perform any and all other functions, tasks, or related duties as needed or as requested by upper management.
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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: Reviewing property files and related documents in preparation and in conducting tenant file inspections; preparing federal forms for reporting to Internal Revenue Service; proofreading documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing: Answering telephone inquiries and while conducting tax credit property inspections.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Speaking: Discussing the inspection process with managers/owners at property sites; answering inquiries over the telephone and providing verbal information; public speaking at Committee sponsored and other workshops.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Walking: Conducting physical building and unit inspections of tax credit properties; distributing information and work to be reviewed to supervisory staff; copying.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sitting: Sitting at desk answering telephone inquiries or making telephone calls for clarification of project issues prior to and after a tax credit property inspection.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standing: When providing public presentations.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balancing: Possible while physically inspecting a property.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concentrating: Analysis of tax credit property files prior to and after inspection to determine if property owners are in compliance with federal and state regulations; determining appropriate response to written correspondence; determining needs of callers and providing information; preparing reports and federal forms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Comprehension: Understanding procedures and policies governing the Committee; understanding the inquiries from callers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working Independently: Must be able to work alone without much guidance or interaction from other staff at times.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lifting up to 10 LBS occasionally: Carrying project files from file room to office.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up to 20 LBS occasionally and/or 10 LBS frequently:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up 20-50 LBS occasionally and/or 25-50 frequently:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fingering: Pushing buttons on the computer, calculator and telephone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching: Answering telephone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Carrying: Transporting project application files to and from office and file room; carrying laptop computer to tax credit property inspections.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing: Stairs at tax credit property sites when inspecting properties.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending at waist: Possible while physically inspecting a property.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling: Possible while physically inspecting a property.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing or pulling: Possible while physically inspecting a property.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handling: Using computer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Driving: To and from tax credit property inspections throughout the State.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Operating equipment: Computer, telephone, Xerox machine; fax.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working indoors: Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working outdoors: Inspecting the grounds and buildings of tax credit properties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Working in confined space: Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**PART B
PROSPECTIVE EMPLOYEE RESPONSE**

Position No: 342-001-5393-050	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?

<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.

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.)

Applicant's Signature	Date Signed
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