

**DUTY STATEMENT  
STATE TREASURER'S OFFICE  
CALIFORNIA TAX CREDIT ALLOCATION COMMITTEE**

<b>PART A</b>	
<b>Position No: 342-001-5157-004</b>	<b>Date:</b>
<b>Classification: Staff Services Analyst</b>	<b>Name:</b>
Under the general direction of the Staff Services Manager II and Program Manager I, this continuous 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.	
<b>Percentage of time performing duties</b>	<b>ESSENTIAL FUNCTIONS</b>
<b>50%</b>	Analyzing, assess, and audit entry level files for compliance with the Low Income Housing Tax Credit program as determined by the Internal Revenue Code Section 42 and state law. Must possess strong mathematical skills in order to calculate complex income and asset calculations and verify rents for low income housing tax credit residents, then compare those charges to applicable LIHTC Rent and Income limits. Conduct physical inspections of units to determine habitability per Uniform Physical Condition Standards (UPCS). 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 needed to correct. Track progress of owner attempts to rectify noncompliance.
<b>25%</b>	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 advise supervising manager on the status of the assigned portfolio. Prepare status reports, spreadsheets, written correspondence, and prepare 8823 attachment. Notify manager if deadlines for submission of required documentation have lapsed.
<b>10%</b>	Conduct various basic research projects independently or as directed; develop and maintain reports as needed and perform other duties necessary to the overall support of the California Tax Credit Allocation Committee (CTCAC).
<b>5%</b>	Respond to 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 federal and state program requirements.
<b>5%</b>	Read, review and research legislation (both current and prior years) to maintain a thorough working knowledge of all aspects of the LIHTC program and how it affects the compliance aspect of the monitoring process. Attend required classes and meetings to maintain current working knowledge.

<b>Percentage of time performing duties</b>	<b>NON-ESSENTIAL FUNCTIONS</b>
<b>5%</b>	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 the management team.

## PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS

Activity	Not Required	Less than 25%	25% - 49%	50% - 74%	75% or more
<b>Vision:</b> 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"/>
<b>Hearing:</b> 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"/>
<b>Speaking:</b> 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"/>
<b>Walking:</b> 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"/>
<b>Sitting:</b> 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"/>
<b>Standing:</b> When providing public presentations.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Balancing:</b> Possible while physically inspecting a property.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Concentrating:</b> 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"/>
<b>Comprehension:</b> 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"/>
<b>Working Independently:</b> 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"/>
<b>Lifting up to 10 LBS occasionally:</b> Carrying project files from file room to office.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Lifting up to 20 LBS occasionally and/or 10 LBS frequently:</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Lifting up 20-50 LBS occasionally and/or 25-50 frequently:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fingering:</b> Pushing buttons on the computer, calculator and telephone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Reaching:</b> Answering telephone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Carrying:</b> 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"/>
<b>Climbing:</b> 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"/>
<b>Bending at waist:</b> Possible while physically inspecting a property.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Kneeling:</b> Possible while physically inspecting a property.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Pushing or pulling:</b> Possible while physically inspecting a property.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Handling:</b> Using computer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Driving:</b> 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"/>
<b>Operating equipment:</b> Computer, telephone, Xerox machine, fax.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Working indoors:</b> Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Working outdoors:</b> 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"/>
<b>Working in confined space:</b> Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**PART B  
PROSPECTIVE EMPLOYEE RESPONSE**

<b>Position No: 342-001-5157-004</b>	<b>Date:</b>
<b>Classification: Staff Services Analyst</b>	<b>Name:</b>

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.


**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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