

DUTY STATEMENT HOUSING FINANCE TRAINEE (GENERAL)

OUR VISION

Every Californian can build a thriving life in a stable home.

OUR MISSION

Deliver reliable financing solutions to advance housing opportunities for Californians.

EMPLOYEE INFORMATION

Employee Name		Effective Date		
Classification Housing Finance Trainee (General)		Position Number 693-001-5225-901		
Division/Section/Unit Single Family /Lender Services Division				
CBID R01	Work Week Group 2	Location Sacramento, CA	Tenure Permanent	Time Base Full-Time
Immediate Supervisor		Supervisor Classification Housing Finance Officer (Single Family)		

CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

This position requires the incumbent to maintain acceptable, consistent, and regular attendance; communicate effectively orally and in writing in dealing with the public and/or other employees; develop and maintain knowledge and skills related to the position’s specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to the Agency’s policies and procedures regarding attendance, leave, and conduct.

2 CCR § 172 – General Qualifications, states in pertinent part:

The incumbent is expected to possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.

DIVISION DESCRIPTION

The California Housing Finance Agency’s (CalHFA) Single Family Division works to help low to moderate-income homebuyers purchase homes in California. The Single-Family Lender Services Division is responsible for three main functions. Lender Administration reviews and approves all new lender applications and the recertification of all existing lenders, Lender Outreach represents CalHFA at all market industry events in a promotional and speaker roll, and Lender Training provides training for all approved lenders, through both in-person and webinar sessions, on the guidelines, requirements, and processes of originating and closing CalHFA loans.

POSITION DESCRIPTION

Under close supervision of the Housing Finance Officer (Single Family), the Housing Finance Trainee (General) performs a variety of technical and analytical duties related to providing customer service to CalHFA’s approved lender network as well as industry partners and borrowers, while supporting the day-to-day operations of the Lender Services Team.

The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties, commensurate with this classification, as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload. The duties and responsibilities include, but are not limited to the following:

Employee Name	Classification Housing Finance Trainee (General)
---------------	--

Division/Section/Unit Single Family/Lender Services Unit
--

PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS
75%	<p><u>Customer Service</u> Performs customer service duties, answers telephones, and responds to inquiries for Single Family Lender Services and Loan Production Units. Answers questions from borrowers, lenders, realtors, and other industry professionals. Provides loan information, program guidelines, and answers status questions. Assists CalHFA Lenders with input into CalHFA's Loan Scenario Calculator and refers lender to CalHFA Loan Program Handbooks as a resource for inquiries regarding CalHFA programs and policies. Monitors email in-boxes for Single Family Programs and Lender Training and prepares responses to questions from CalHFA approved lenders, other industry professionals, and borrowers as to CalHFA program requirements, underwriting guidelines, loan file submission, approval procedures, and purchase package submission.</p>
10%	<p><u>Training and Outreach</u> Provides support for Lender Training and Outreach by monitoring attendance for training events and coordinating with Marketing to provide materials for events. Tracks registrations and completes training activities in the Learning Management System (LMS). Inputs training dates on report regarding training and outreach events for Single Family managers.</p>
10%	<p><u>Applications and Recertifications</u> Provides support to Housing Finance Associate for new lender applications and annual recertifications, which includes initial review of application or recertification packages for completeness. Updates New Lender and Recertification Status spreadsheets to track approval progress. Runs background checks for lender applicants to ensure compliance with Agency standards. Process lender checks for deposit with Fiscal Services. Update Branch lists in lender database.</p>
PERCENTAGE OF TIME	MARGINAL FUNCTIONS
5%	<p>Prepares letters, forms, and other documents in Microsoft Word and Excel. Participates in training, attends staff meetings, handles special projects, prepares monthly reports, and performs other duties as required within the scope of the assigned classification.</p>

PERSONAL CONTACTS
<ul style="list-style-type: none"> Daily contact with all levels of departmental staff, borrowers, third parties, the public, and mortgage and real estate professionals.

SPECIAL REQUIREMENTS
<ul style="list-style-type: none"> N/A

WORK ENVIRONMENT
<ul style="list-style-type: none"> Prolonged sitting Work in a high-rise building Use a computer keyboard and read from computer screens several hours a day

PHYSICAL ABILITIES
<ul style="list-style-type: none"> Be able to transport up to 20 lbs.

TRAVEL
<ul style="list-style-type: none"> Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)

Employee Name	Classification Housing Finance Trainee (General)
---------------	--

Division/Section/Unit Single Family/Lender Services Unit
--

EMPLOYEE ACKNOWLEDGEMENT
 I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with Human Resources.)

Employee Name	Employee Signature	Date
---------------	--------------------	------

SUPERVISOR ACKNOWLEDGEMENT
 I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.

Supervisor Name	Supervisor Signature	Date
-----------------	----------------------	------