

State of California
California Housing and Homelessness Agency
Housing Development and Finance Committee

DUTY STATEMENT

Division:
Unit: Multifamily Finance Integration and Strategy
Position Number: 465-500-5758-001 (PS 2587)
Classification: Research Data Specialist II
Working Title: Senior Housing Development Finance Data Specialist
HQ Location: HDFC Headquarters, Sacramento
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 general direction of the Manager II, the Research Data Specialist II (RDS II) serves as a prime resource and subject matter expert to create, design, implement, evaluate, and report on highly complex and sensitive research projects, activities, and/or strategies that significantly impact housing policy across a spectrum of priority areas. The RDS II performs complex quantitative data analysis, high-level research, and creates new data models and visualizations to ensure information needs are met. The RDS II independently or with a team identifies data needs and trends, develops strategies, and uses the results to frame policy-making discussions. Strong communication and analytical skills and Excel or similar software expertise are essential. The RDS II serves as a subject matter expert resource to branch management and HDFC, working collaboratively in the unit and performing the essential functions as directed.

The position plays a leading role in designing and implementing HDFC's integrated multifamily housing finance programs in collaboration with other State agencies. The position requires the ability to develop and deliver independent analysis and recommendations on housing development finance policy, legislation, statute, industry-related matters, programs, data collection and storage. The role requires an understanding of affordable multifamily housing development finance. Collaboration with other HDFC staff and leaders, as well as with other HDFC member groups is critical in this role.

% of Time **Essential Functions:**
35% **Policy and subject-matter expert**

Independently plan, coordinate, and conduct highly complex and sensitive research and analysis related to affordable housing, community and economic development issues, industry trends, cost efficiency measures, and unit production. Design and develop research methodologies required to ensure the

collection and analysis of appropriate, meaningful, and unbiased data. Utilize data models to forecast and assess the financing process for State funded and administered multifamily lending programs, and other special projects. Provide subject-matter expertise on multifamily lending programs and ensuring quality control. Provide oversight of the research process, data compilation and tabulations to ensure in-depth and rigorous analysis and forecasting of housing trends, needs, and outcomes using primary and secondary research to ensure soundness of research findings. Prepare detailed reports, memos, presentations and briefs to make recommendations.

Lead the research, collection, and analysis of information and data to streamline the affordable housing finance process and ensure effectiveness and efficiency for all HDFC members and other State housing agencies. Identify necessary statutory and regulations changes to implement streamlined alignment of state affordable housing finance programs and funding. Collaborate with State housing agencies and other affected state, local, and governmental agencies to aid in the development of streamlined state affordable housing funding programs. Participate in the implementation of a streamlined system, as directed.

35%

Data Collection and Analysis

Utilize statistical and data management software to explore demographic, economic, financial, and housing data and other factors critical to streamlining the State's affordable housing finance process. Utilize software programs and data management systems to organize data and create data models relevant to affordable housing. Develop and support new program applications, information and data storage, data sharing, including web-based systems. Apply advanced skills in Excel automation and programming (Visual Basic for Applications) to improve data quality, implementation processes, reduce data entry time, and automate routine data entry or reporting tasks. As directed, mentor or train HDFC program staff on maintaining or improving applications and provide support for automation or database querying.

Design, develop, and maintain housing, demographic, economic, and programmatic databases, and files. Develop and continuously improve systems by reviewing current protocols, processes, decision-making steps, and compare them with best practices to propose modifications or new business process improvements to ensure efficiency, promote consistency within the division and across affordable housing finance programs.

20%

Communicate Findings from Analysis

Translate results of research and analysis into practical recommendations for programmatic, policy, and system transformation. Present findings to inform strategic planning and executive leadership decision-making, present to external audiences as appropriate. Facilitate communications, meetings, and work with internal and external stakeholders to inform statutory and policy implementation, program development and design, and establish processes and procedures. Ensure legislative, regulatory agency, and HDFC goals and objectives are met.

Develop and analyze ad hoc reports using various databases and present findings. Write and edit policy and programmatic documents and other forms of communication, develop best practices. Prepare and present written briefs, memos, reports, qualitative and quantitative data analysis, technical assistance documents, and training materials. Prepare, edit, and review bill and legislative analyses. Communicate and coordinate communication across HDFC, divisions, and with other State agencies and external stakeholders. Attend all state and HDFC mandated training within the required time specifications.

% of Time Marginal Functions:

10% Complete other projects, assignments, training, and administrative tasks as directed by management, including support of State excess sites and local public lands. Train counterparts and staff on all work-related duties, as needed. Perform other job-related duties as assigned.

Special Requirements: (Define all that apply)

Travel: Up to 10% statewide travel may be required. This includes overnight travel with overnight stays throughout the state which may be required to attend conferences, stakeholder outreach workshops, and provide technical assistance.

Supervision Exercised: None

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

Background Check: 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 (In Office): The incumbent works in an office setting that is air conditioned and may be in a high-rise building with elevator access, cubicle, or office with natural and artificial lighting.

Working Conditions (Telework): The incumbent is required to maintain safe working conditions at the approved alternate work location and abide by HDFC Ergonomic Program guidelines and agrees to maintain a distraction-free remote work environment.

Administrative Responsibility: The incumbent advises executive leadership on both specific and general policy issues affecting HDFC programs and will support the HDFC capacity to obtain funds to manage programs in support of the HDFC mission and policies.

Personal Contacts: The incumbent will serve as the main contact between the assigned HDFC Multifamily Finance Integration and Strategy unit 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 HDFC 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 HDFC, state and local agencies or create misleading perceptions. Incumbent must possess political sensitivity to exercise judgement on when it is appropriate to engage in a sensitive topic.

Diversity, Equity, and Inclusion: All employees at HDFC are expected to uphold the values of diversity, equity, and inclusion (DEI), which includes being committed to fostering an environment in which employees from 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 HDFC 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 HDFC. Additionally, all HDFC 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.