

DUTY STATEMENT
CALIFORNIA DEPARTMENT OF VETERANS AFFAIRS

PART A	
Position No: 831-117-5393-005	Date:
Class: Analyst II	Name:
Under the direction of the Supervisor I, over the CalVet Home Loans Marketing Team, the Analyst II markets the CalVet Home Loan program in Northern California. This includes being the primary contact with outside agencies, including non-profit organizations, in the administration of the CalVet Home Loan low-income housing pilot program. The incumbent will also originate a pipeline of loans based on assigned leads primarily associated with specialty and low-income products.	
Percentage of time performing duties:	ESSENTIAL FUNCTIONS
45%	Serve as <i>primary CalVet Home Loans marketing representative</i> in Northern California and back-up for Southern California for the CalVet Home Loan Program. ▪ Attend, set up, and coordinate community events, industry meetings, conferences and trade shows as lead agent on behalf of the Home loan program for marketing, training, or informational purposes. (will include public speaking) ▪ Plan training, meetings, and trade shows by identifying, assembling, and coordinating requirements; establishing contact; developing schedules; making payments; and delivering equipment, etc. ▪ Provide excellent customer service to represent CalVet Home Loans with professionalism and accountability. ▪ Solve various customer problems and handle escalated issues with a high degree of independence. ▪ Prepare, review, and respond to correspondence (both electronic and written), including but not limited to the more complex and sensitive communications. ▪ Create and prepare a comprehensive follow-up system for leads and contract deadlines. ▪ Required to take part in sales and marketing meetings and present reports about sales and marketing figures. ▪ Disseminate information to the public and real estate professionals regarding CalVet policies, procedures, contracts, statutes, and regulations (electronic/written/verbal – in person or on the phone). ▪ Train lower-level staff members and real estate professionals. ▪ Travel will be required: • Must have a valid California Driver's license and will use a rental car to travel to required events, customer homes, real estate professional offices, and military bases within the Northern and Southern California area. • Must take and pass the state defensive driving course and all other required courses and programs as required by CalVet.
25%	Provide backup, a <i>single point of contact</i>, and support for our <i>low-income pilot programs</i> in California. ▪ Establish, develop, and maintain processes and procedures for the pilot CalVet REN or any other low-income housing programs. ▪ Provide training and administrative support to non-profits, state, cities, and counties regarding CalVet low-income housing programs. ▪ Determine eligibility; provide preapprovals, and oversee processing of low-income housing loan applications and documentation submissions. ▪ Work closely with underwriting and loan closing units to ensure smooth processes.

20%	▪ Travel and represent CalVet at events related to the low-income housing programs. Originate CalVet home loans for all regions when required by veteran requests statewide in our centralized origination and processing center. ▪ Independently analyze and determine military and loan eligibility, credit, asset, property and income eligibility for all CalVet home loan programs. ▪ Accurately calculate income and assets to determine debt-to-income ratios and sufficient funds for closing. Responsible for final sign-off authority on income and assets. ▪ Must have Comprehensive knowledge of lending guidelines for multiple programs and products. ▪ Analyze credit reports to determine the creditworthiness and willingness of a borrower to pay a long-term mortgage. ▪ Comprehensive knowledge of preliminary title, appraisal, and credit reports with the ability to approve these reports in the loan analysis. ▪ Understanding of property values and minimum property requirements in the loan analysis. ▪ Independently determine a loan approval or denial decision in processing loan applications and preapprovals. ▪ Manage a portfolio of leads and loans, following up for future business. ▪ Multitask and manage a high volume of loan leads and files with various deadlines to meet. 5% Analyze accounts, perform research, input data, and prepare spreadsheets, reports, and word processing utilizing computer and web-based programs (e.g., MITAS, Microsoft Word, Excel, Outlook, Internet/Intranet, SharePoint, Valeri, Calyx) in support of the CalVet Home Loan Program. Provide research documentation and recommendations to management regarding the more complex and/or sensitive issues resulting from account analysis. Subject matter expert for loan processing/origination and required to participate in testing of systems, development of processes, and projects for the CalVet and Home Loan Program. Develop/write desk procedures, policies, memorandums, and requests for legal opinions. Other related duties as assigned by the Division.
NON-ESSENTIAL FUNCTIONS	
5%	Other related duties as assigned.

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PART B - PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS					
Activity	Not Required	Less than 25%	25% to 49%	50% to 74%	75% or More
VISION: View computer screen; prepare various forms, memos, reports, letters, and proofread documents					X
HEARING: Answer telephone; communicate with Administration, department managers, department staff; providing verbal information.					X
SPEAKING: Communicate with staff, residents and the public in person and via telephone; interact in meetings.					X
WALKING: Within the home to the various units.				X	
SITTING: Work station, meetings and training.				X	
STANDING: Copy documents; review records.			X		
BALANCING:					X
CONCENTRATING: Review documentation for accuracy; complete forms, calculate pay, time and attendance; research laws, rules and processes.					X
COMPREHENSION: Understand employee needs as it relates to Human Resources; laws, rules, regulations, policies and procedures; content of meetings, trainings and work discussions; facilitate the dynamic of team work.					X
WORKING INDEPENDENTLY: Must be able to apply laws, rules and processes with minimal guidance					X
LIFTING UP TO 10 LBS:					
LIFTING 10 - 25 LBS:					
LIFTING 25-50 LBS:					X
FINGERING: Push telephone buttons, calculator keys, and computer keyboard.					X
REACHING: Answer telephone; use a mouse; retrieve documents from printer.					X
CARRYING: Transport documents, mail.					X
CLIMBING:					X
BENDING AT WAIST: Use copier; access low file drawers.					X
KNEELING: Access low file drawers.				X	
PUSHING OR PULLING: Open and close file drawers.				X	
HANDLING: Sort paperwork; distribute mail.			X		
DRIVING: Special events.					X
OPERATING EQUIPMENT: Computer, telephone, copier, printer, fax machine.					X
WORKING INDOORS: Enclosed office environment.				X	
WORKING OUTDOORS: Special events.				X	
WORKING IN CONFINED SPACE: File, supply, storage rooms, etc.		X			

I have read and understand the duties listed on this Duty Statement and I can perform these duties with or without reasonable accommodation.

Employee signature _____ Date _____

Supervisor signature _____ Date _____

Human Resources signature _____ Date _____