

DUTY STATEMENT

HOUSING FINANCE OFFICER (SINGLE FAMILY)

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 Officer (Single Family)		Position Number 693-001-5247-901		
Division/Section/Unit Single Family Division/Special Programs & Analytics Unit				
CBID S01	Work Week Group E	Location Sacramento, CA	Tenure Permanent	Time Base Full Time
Immediate Supervisor			Supervisor Classification Director of Homeownership Program	

POSITION DESIGNATED CONFLICT OF INTEREST

This position is designated under the Conflict-of-Interest Code. The position is responsible for making or participating in making governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of the appointment. Failure to comply with the Conflict-of-Interest Code requirements may void the appointment.

CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

This position requires the incumbent to 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. Must maintain regular and consistent attendance at such level as is determined at the Agency's sole discretion. Must be regularly available and willing to work the hours the Agency determines are necessary or desirable to meet its business needs.

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 via the financing of first mortgages and down payment assistance.

POSITION DESCRIPTION

Under the general direction of the Director of Homeownership Program, the Housing Finance Officer (Single Family) leads the Special Programs and Program Analysis unit, providing high-level project and program management, leading or assisting in program design or refinement, and directing housing policy and business analysis functions to ensure timely and effective implementation of CalHFA programs to fulfill the Agency's business needs and policy objectives.

Employee's Name	Classification Housing Finance Officer (Single Family)
Division/Section/Unit Single Family Division/ Special Programs & Analytics Unit	
The duties contained in this job description reflect general details 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:	
PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS
35%	Program Management Responsible for the management and oversight of various Single-Family Programs, including Accessory Dwelling Unit grant program, State Route 710 Affordable Sales Housing Program, and Disaster Rebuilding Assistance Program. Provides comprehensive program administration including developing and executing program guidelines and procedures, and coordinating with Loan Production and Loan Administration to develop and implement program requirements and resolve operational issues. Monitors program performance to ensure compliance with applicable statutes, regulations, and internal policies. Manages contracts and budgets associated with each program. Recruits, onboards and provides ongoing oversight of any external partners to ensure quality performance and adherence to contractual obligations. Performs other related program management functions necessary to support the smooth and efficient operation of Single-Family Special Programs.
25%	Analysis and Reporting Oversees and coordinates qualitative and quantitative policy, financial and market analysis related to Single Family programs. Leads or coordinates required regulatory reporting, including mandatory reports that may be required for California Debt limit Allocation Committee and the Internal Revenue Service. Collaborates closely with Director of Homeownership in directing analysis and research on the policy and business aspects of new programs and initiatives, including evaluation of target populations, social equity, fair housing, land use and climate implications of current and proposed programs. Directs the preparation of reports and presentations summarizing such analysis and research.
25%	New Program Design and Implementation Leads the design, planning and implementation of new Single Family programs and initiatives by establishing project scope, milestones, phases, and elements for the development of new programs. Works with Director of Homeownership, Loan Production, Loan Administration, and Program System and Support teams to develop new program parameters that balance both business imperatives driven by mortgage and other lending practices with larger housing policy objectives. Facilitate cross-functional collaboration with various Agency business units including Program Development and Policy Team, Legal, Single-Family staff to understand CalHFA policy and business needs for new programs and initiatives. Develops project plans and requirements, and prepares materials to communicate program parameters, scenarios, decision points and implementation milestones to executive leadership and California Housing and Homelessness Agency staff. Serves as liaison to the Project Management Unit, coordinating with all SF units as well as Legal, Program Development and Policy Team, Marketing and Communications, Financing, Fiscal, and other divisions to oversee completion of all program implementation tasks and processes. Monitors project progress against established timelines to ensure timely completion of deliverables and compliance with CalHFA rules, policies, and regulations. Reviews all new program guidelines, documents and agreements for accuracy, consistency, and compliance with statutory and regulatory frameworks.

Employee's Name		Classification Housing Finance Officer (Single Family)	
Division/Section/Unit Single Family Division/ Special Programs & Analytics Unit			
10%	Authors and assists with the development and issuance of Program Bulletins and website changes, including but not limited to Program Handbooks, Lender Program Manual and website, ensuring clear communication of program updates or changes to internal and external stakeholders. Coordinates and oversees the review of all program and legal documentation to ensure consistency and completeness. Designs, develops and monitors program policies and procedures in accordance with associated statutes and regulations. Staff Management Direct and closely supervises various staff in the unit, overseeing daily operations and long-term projects. Develops and implements comprehensive training programs for subordinate staff, covering all aspects of Single-Family work deliverables and responsibilities. Evaluates, provides feedback, and conducts evaluations (performance and probationary) appraisals to engage, and encourage staff development. Provides guidance and recommends training opportunities to enhance professional abilities and growth. Updates and maintains duty statements, participates in recruiting, interviewing, and hiring processes while adhering to best hiring practices. Approves time off requests, travel expense claims, and timesheets.		
PERCENTAGE OF TIME	MARGINAL FUNCTIONS		
5%	Prepares letters, forms, and other documents in Microsoft Word and Excel. Participates in staff meetings, attends training, provides work status reports, handles special projects, and performs other duties as required within the scope of the classification.		
PERSONAL CONTACTS			
Daily contact with the public, all levels of departmental staff, and representatives from other State and county agencies.			
SPECIAL REQUIREMENTS			
N/A			
WORK ENVIRONMENT			
- Prolonged sitting - Works in a high-rise building - Uses a computer keyboard and reads from computer screens several hours a day			
PHYSICAL ABILITIES			
Ability to transport up to 20 lbs.			
TRAVEL			
- Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.) - Travel may include overnight stay.			
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			

Employee's Name		Classification Housing Finance Officer (Single Family)
Division/Section/Unit Single Family Division/ Special Programs & Analytics Unit		
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