

DUTY STATEMENT

HOUSING FINANCE SPECIALIST (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 Specialist (Single Family)			Position Number 693-001-5143-901	
Division/Section/Unit Single Family Division/Loan Production/Lender Services Unit				
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 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 minimum direction of the Housing Finance Officer (Single Family), the Housing Finance Specialist (Single Family) serves as a lead trainer, developing and delivering comprehensive presentations to educate mortgage industry professionals on Agency products, policies, and processes. The incumbent also supports event logistics, manages training materials and resources and represents the Agency at both virtual and in-person industry events to advance program understanding and stakeholder engagement.

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

Employee's Name		Classification Housing Finance Specialist (Single Family)
Division/Section/Unit Single Family Division/Loan Production/Lender Services Unit		
50%	Training Development Independently develops and maintains comprehensive training content for CalHFA's Single Family Lending programs, including video modules, process overviews, submission workflows and compliance guidance of purchase documentation hosted on the CalHFA website. Conducts ongoing monitoring of website training and program materials to ensure accuracy, clarity and alignment with current policies and program guidelines. Collaborates with division staff and Marketing teams to address any errors or inconsistencies on the content and ensure timely communication of program changes to external stakeholders. Exercises technical judgment to identify training gaps, recommend content enhancements, and implement improvements that support lender compliance, streamline operational processes, and strengthen partner understanding of CalHFA programs. Implements feedback mechanisms, such as post training evaluations, stakeholder surveys, and analytics from digital platforms, to assess training effectiveness and identify opportunities for continuous improvement. Researches advanced instructional design methods, digital learning tools, and industry best practices to modernize CalHFA's training approach and enhance learning outcomes across partner groups.	
25%	Single Family Outreach Represents CalHFA at public presentations, conferences and industry meetings, effectively communicating program updates, policy direction and strategic initiatives with government officials, developers, lenders, industry groups and associations. Provides advanced technical assistance on Single Family programs to internal staff and external partners including nonprofit housing organizations, lenders, brokers, realtors, and other industry professionals, by interpreting program guidelines, resolving complex issues, and advising on compliance and operational requirements. Prepare visual, digital, and written materials for seminars and/or presentations, ensuring content is accurate, engaging, and aligned with CalHFA's communication standards and program goals.	
10%	Product Development Collaborates with Single Family Management on the development, refinement and implementation of new lending products and special programs, applying technical knowledge to ensure alignment with CalHFA's mission, operational capabilities, and industry best practices. Participates in strategic planning sessions and provides market and lender-based insights to evaluate feasibility, forecast demand and support informed decision-making. Conducts independent research on emerging trends and policy changes to identify opportunities for program enhancements. Prepares analytical reports, briefing materials, and recommendations for management that synthesize data and feedback to support strategic direction.	
10%	Lender and Public Assistance Serve as backup in Single Family Lending's phone queue and Lender email support to provide assistance with complex matters, offering guidance and information to staff, lenders, public and other stakeholders regarding Single Family Lending policies, procedures, issues, and programs. Collaborates closely with Single Family Lending and other CalHFA Divisions and staff, as needed, to coordinate program activities and resolve issues.	
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.	

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PERSONAL CONTACTS		
<ul style="list-style-type: none"> Daily contact with the public, all levels of departmental staff, and representatives from other State and county agencies. 		
SPECIAL REQUIREMENTS		
<ul style="list-style-type: none"> N/A 		
WORK ENVIRONMENT		
<ul style="list-style-type: none"> Prolonged sitting Works in a high-rise building Uses a computer keyboard and reads from computer screens several hours a day 		
PHYSICAL ABILITIES		
<ul style="list-style-type: none"> Ability 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.) Travel may include overnight stay. 		
EMPLOYEE ACKNOWLEDGEMENT		
<p>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.)</p>		
Employee Name	Employee Signature	Date
SUPERVISOR ACKNOWLEDGEMENT		
<p>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.</p>		
Supervisor Name	Supervisor Signature	Date