



Office of Statewide Health  
Planning and Development

## **ASSOCIATE HEALTH FACILITY CONSTRUCTION FINANCING ANALYST**

**Exam Code: 9SHAB**

**Department:** Office of Statewide Health Planning and Development

**Exam Type:** Departmental, Open, Spot

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Associate Health Facilities Construction Financing Analyst – \$5,149.00 - \$6,446.00**  
per month.

For more information view the [classification specification](#).

### **APPLICATION INSTRUCTIONS**

Final Filing Date: Continuous

Applications are accepted continuously throughout the year; however, they will only be processed during the administration period following the cut-off dates listed below.

- June 15, 2020
- January 15, 2021

Applications must be postmarked by the cut-off date. Applications received via hand delivery or interagency mail after 5:00pm on the cut-off date will be held for the next administration period. Dates printed on Mobile Bar Codes, such as the Quick Response (QR) Codes available at the USPS, are not considered postmark dates for the purpose of determining timely filing. State applications must have an original signature. The examination title must be indicated on the application. Faxed or emailed applications will not be accepted.

### **WHO SHOULD APPLY**

Applicants who meet the minimum qualifications as stated on this bulletin may apply for and take this examination.

Bulletin Date: 5/22/2020

Once you have taken this examination, you may not retake it for **9** months.

## HOW TO APPLY

Complete and submit the following documents to the address indicated below. **DO NOT SUBMIT DOCUMENTS TO THE CALIFORNIA DEPARTMENT OF HUMAN RESOURCES (CALHR).**

- [State Application \(STD. 678\)](#)
- **Proof of completion of the required education (copies are acceptable)**

**Note: Application packages submitted without all of these documents will be rejected.**

**Mail or Hand deliver apps to:**

**Office of Statewide Health Planning and Development  
Human Resources Services Section  
Attention: S Shea  
2020 West El Camino Avenue, Suite 1016  
Sacramento, CA 95833**

### **Special Testing Arrangements:**

If you have a disability and need special testing arrangements, mark “yes” for question #10 on the State Application STD. 678 (Rev. 7/2019) and include a completed Accommodation Request form STD. 679. The Examination Unit will contact you to make special testing arrangements.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

It is your responsibility to ensure you meet the minimum qualifications stated on this announcement. Your signature on the State Application (STD. 678) indicates that you have read, understood, and possess the minimum qualifications required.

Applications will be reviewed to ensure the minimum requirements for participation in this exam are met. Possession of the minimum requirements does not assure a place on the eligible list.

Note: All State Applications (STD.678) must include: “to” and “from” dates (month/day/year), hours worked per week, official job titles/classifications, and duties performed. State Applications (STD.678) received without this information may be rejected. Resumes will not be accepted in lieu of a completed State Application (STD. 678).

## **MINIMUM QUALIFICATIONS**

All applicants must meet the education and/or experience requirements as stated on this exam bulletin to be accepted into the examination. Part-time or full-time jobs, regardless of whether paid or volunteer positions, and inside or outside California state service will count toward experience.

### **ASSOCIATE HEALTH FACILITIES CONSTRUCTION FINANCING ANALYST**

#### **EITHER I**

One year of experience in the California state service performing financial analyses of health facilities or other large facilities in a class with a level of responsibility equivalent to a Health Facility Construction Financing Analyst, Range C.

#### **OR II**

Education: The following education is required when non-California state service experience is used to qualify at any level. Equivalent to graduation from college, preferably with a major in business administration, accounting, real estate, economics, finance, or construction management. Technical or analytical experience in one or a combination of the following may be substituted for the required education on the basis of one year of experience equals one year of college education:

1. Construction or mortgage loan underwriting, originating, processing, closing, or evaluating lender or borrower performance with an institutional lender or investor, Federal Housing Administration, Veteran's Administration, Federal National Mortgage Association, or comparable Federal or State agency.
2. Managing investment portfolios including the responsibilities for investment decisions or recommendations, research, credit analyses, and due diligence for retirement plans, corporations, or public jurisdictions.
3. Serving as the financial advisor in a managerial capacity for corporation, retirement plan, or public jurisdiction.

#### **And**

Experience: Two years of technical or analytical experience in one or a combination of the following:

1. Construction or mortgage loan underwriting, originating, processing, closing, or evaluating lender or borrower performance with an institutional lender or investor, Federal Housing Administration, Veteran's Administration, Federal National Mortgage Association, or comparable Federal or State agency.

2. Managing investment portfolios including the responsibilities for investment decisions or recommendations, research, credit analyses, and due diligence for retirement plans, corporations, or public jurisdictions.

3. Serving as the financial advisor in a managerial capacity for a corporation, retirement plan, or public jurisdiction.

Experience in the California state service applied towards this pattern must include at least one year in a class with a level of responsibility equivalent to a Health Facility Construction Financing Analyst, Range C.

(A master's degree or higher in business administration, accounting, real estate, economics, finance, construction management, or possession of a valid certificate issued by the California State Board of Accountancy to practice as a Certified Public Accountant may be substituted for one year of the required experience.)

## **POSITION DESCRIPTION**

### **ASSOCIATE HEALTH FACILITIES CONSTRUCTION FINANCING ANALYST**

This is the journey-level of this series. Under general supervision, incumbents perform responsible analytical and technical health facility construction finance duties. Incumbents at this level perform all phases of work involved in the analysis of requests for loan insurance including developing fully documented applications; analyzing financial and legal documents and information necessary to assure sufficient financial ability to repay the loan; issuing loan insurance commitments; closing escrow for the insured loan; approving construction payments to the contractor and others; monitoring loan payments to the trustee; and developing a course of action in case of a default.

## **POSITION LOCATION**

Spot location for Sacramento county only.

## **EXAMINATION SCOPE**

This examination consists of the following components:

Education and Experience Examination – Weighted 100% of the final score.

The examination will consist solely of an **Education and Experience Examination**.

A final score of 70% must be attained to be placed on the eligible list.

In addition to evaluating applicants' relative knowledge, skills, and ability, as demonstrated by quality and breadth of education and/or experience, emphasis in each exam component will be measuring competitively, relative job demands, each applicant's:

## **Knowledge and Abilities**

Knowledge of: Programs, policies, and organization of the California Health Facility Construction Loan Insurance Program; computer software for financial and investment analyses; financial feasibility study research methods and techniques, purpose and functions of health facilities eligible for California Health Facility Loan Insurance; trends in the development and utilization of health facilities in California; methods and trends of debt financing for health facilities; California laws and regulations governing loan insurance programs; principles and practices of the effective management of health facilities; loan and bond finance terminology used in health facility financing; health facility revenue sources and reimbursements; legal and financial documents used in debt financing; cash flow estimating; principles and practices of the securities industry; construction financing and document management; principles, methods and procedures involved in the cost estimates, financing, and construction of health facilities; principles and practices of real estate mortgage lending; real estate law; basic accounting principles and procedures; commercial appraisal methods; principles and practices of buying, selling, financing, leasing, repossessing, foreclosing, and managing of real property; state and federal environmental laws, debt financing methods including new money project financing, refunding/refinancing, fixed and variable rate financing methods, crossover refundings, and derivative products; and departmental objectives, policies, and procedures.

Ability to: Learn and apply technical construction loan finance methods and procedures; establish and maintain cooperative relationships and effective communications; prepare clear and concise reports; analyze and evaluate data and information accurately and draw sound conclusions; reason logically; perform computations accurately; consult with others on construction finance matters; and analyze and interpret financial statements and use word processing and spread sheet software programs, analyze and interpret a wide variety of construction, financial, and legal documents and studies used in determining eligibility for health facility loans; interpret and apply State loan insurance regulations and policies governing the Cal Mortgage Loan Insurance program; analyze and monitor financial markets and indices that impact variable rates and derivative values; establish and maintain effective working relationships with health facility management, investment bankers, attorneys, contractors, and developers; work independently; use specialized financial tracking software programs; analyze financial information from audited and company prepared financial statements; successfully negotiate loan insurance documents with program applicants, underwriters, and commercial banks; analyze data affecting cost, value, financial condition, and marketability of health facility properties and operations and draw sound conclusions; understand and critique applicants' financial feasibility study assumptions, liquidity, cash flow, and financial solvency; interpret market area demand analyses; analyze historical

financial performance; assess the proposed project with respect to its benefit to the community; identify and analyze operational performance and loan payment problems; and apply and modify program underwriting policies and standards as needed due to changing financial market conditions.

## ELIGIBLE LIST INFORMATION

A departmental, open eligible list for the **ASSOCIATE HEALTH FACILITIES CONSTRUCTION FINANCING ANALYST** will be established for:

### OFFICE OF STATEWIDE HEALTH PLANNING AND DEVELOPMENT

The names of **successful** competitors will be merged onto the eligible list in order of final score regardless of exam date. Eligibility expires **12 months** after it is established. Applicants must then retake the examination to reestablish eligibility.

Veterans' Preference will be granted for this examination. In accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, or widow or widower of a veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligible list.

Veterans status is verified by the California Department of Human Resources (CalHR). Information on this program and [the Veterans' Preference Application](#) (Std. form 1093) is available online. Additional information on veteran benefits is available at the Department of Veterans Affairs.

Career Credits are not granted for the examinations administered on an Open basis or Promotional basis.

## PREPARING FOR THE EXAMINATION

Here is a list of suggested resources to have available prior to taking the exam.

**Employment History:** Employment dates, job titles, organization names and addresses, names of supervisors or persons who can verify your job responsibilities, and phone numbers of persons listed above.

**Education:** School names and addresses, degrees earned, dates attended, courses taken (verifiable on a transcript), persons or office who can verify education, and phone numbers of persons or offices listed above.

**Training:** Class titles, certifications received, names of persons who can verify your training, and phone numbers of persons listed above.

## CONTACT INFORMATION

Office of Statewide Health Planning and Development  
Human Resources Services Section

2020 West El Camino Avenue, Suite 1016  
Sacramento, CA 95833  
Phone: (916) 326-3218

TTY is a Telecommunications Device for the Deaf and is reachable only from phones equipped with a TTY Device.

Office of Statewide Health Planning and Development website: <https://oshpd.ca.gov/>

## **EQUAL OPPORTUNITY EMPLOYER**

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right of family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding, and related medical conditions), and sexual orientation.

## **DRUG-FREE STATEMENT**

It is an objective of the State of California to achieve a drug-free State workplace. Any applicant for State employment will be expected to behave in accordance with this objective, because the use of illegal drugs is inconsistent with the law of the State, the rules governing civil service, and the special trust placed in public servants.

## **GENERAL INFORMATION**

Examination and/or Employment Application (STD 678) forms are available at the California Department of Human Resources, local offices of the Employment Development Department, and through your [CalCareer Account](#).

If you meet the requirements stated on this examination bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described in this bulletin will be rated against a predetermined job-related rating, and all applicants who pass will be ranked according to their score.

The Office of Statewide Health Planning and Development reserves the right to revise the examination plan to better meet the needs of the service, if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all applicants will be notified.

General Qualifications: Applicants must possess essential personal qualifications including integrity, initiative, dependability, good judgement, the ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open

examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) servicewide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

High School Equivalence: Equivalence to completion of the 12<sup>th</sup> grade may be demonstrated in any one of the following ways: 1) passing the General Education Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the competitor is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.