



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
July 8, 2016

Agency: Oregon Housing and Community Services

Division: Housing Finance Division

[] New [x] Revised

This position is:

- [] Classified
[] Unclassified
[] Executive Service
[x] Mgmt Svc – Supervisory
[] Mgmt Svc – Managerial
[] Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

Table with 2 columns and 13 rows containing position details: a. Classification Title, b. Classification No, c. Established Date, d. Position No, e. Working Title, f. Agency No, g. Section Title, h. Budget Auth No, i. Employee Name, j. Repr. Code, k. Work Location, l. Supervisor Name, m. Position, n. FLSA, o. Eligible for Overtime.

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

Oregon Housing and Community Services (OHCS) provides stable and affordable housing, and engages leaders to develop integrated statewide policy that addresses poverty and provides opportunity for Oregonians.

OHCS's Housing Finance Division serves as the state's housing finance agency. OHCS provides financial support to create and preserve quality, affordable housing for Oregonians of lower and moderate incomes.

Housing Finance Division: Multifamily

The Multifamily Housing Finance Section of the Housing Finance Division administers federal and state funded multifamily rental housing resources to facilitate the increased availability of safe, decent, and affordable housing for Oregonians with low incomes. The Multifamily section administers competitive processes as well as other processes to allocate funding resources. The section ensures policy objectives are met while meeting local needs and statewide priorities. The section also ensures long-term affordability through its funding.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Direct the work of the Underwriting Team; responsible for other duties and various special projects as assigned by the Section Manager. To accomplish its mission, this position supervises eight (8) permanent FTE.

This position will evaluate the underwriting system and make changes that allow better customer service and the streamlining of staff activities. This position will be responsible for planning, coordinating, and managing all underwriting activities; reviewing legal documents; the closing process; and stakeholder outreach associated with the function of the position.

This position provides supervision of staff that review, underwrite, and close financially viable affordable housing projects. This position evaluates the effectiveness of internal processes directly related to the underwriting and closing processes and recommends consistent and more efficient workflow. Works with other managers with emphasis on operations with the Financial Management Division and the Asset Management and Compliance Section.

This position is necessary to keep up with the Affordable Housing market with particular attention to preferences and changes in the lending and investment practices of commercial real estate lenders and tax credits investors.

This position acts on behalf of the Section Manager in his/her absence.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

| % of Time | N/R/ NC | E/ NE | DUTIES |
|-----------|---------|-------|--|
| 30 | N | E | <p>Personnel Management</p> <ul style="list-style-type: none"> • Supervise subordinate staff so that underwriting and financial viability of affordable multifamily housing projects is consistent among loan specialists and promotes customer service to both external customers and internal customers including the Director, the Finance Committee, and the State Housing Council. • Promote staff morale and productivity by effectively communicating department priorities and by representing the interest of line staff to senior management. Maintain the productivity of staff through regular staff meetings, performance evaluations, and, as necessary, through corrective action/progressive discipline in accordance with the collective bargaining agreement. |

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| | | | <ul style="list-style-type: none"> • Responsible for all aspects of performance management, which includes: Manage, direct, and assign staff by scheduling and assigning work; review, monitor, and approve work; hire, train, coach, and discipline employees; establish personnel performance measures; and complete and/or approve employee performance appraisals. • Create an atmosphere for team members to learn and grow through direct work involvement and training opportunities. Work to continuously improve employee performance (i.e., classes, training, seminars, etc. related to key responsibilities and/or employee development plan). • Evaluate and enhance interdivisional communications and processes to promote the efficiency and effectiveness in the delivery of section products in order to maintain the integrity of the programs and the consistent service to our customers. • Review and analyze Department policies and procedures; develop recommendations to Executive Team on administrative and programmatic changes. • Learn and understand the agency's affirmative action goals and objectives and to develop, implement, and promote plans to meet those goals; actively engage staff to work toward achievement of the agency's affirmative action objectives and goals. • Define and assign roles to subordinate personnel to maximize staff strengths, streamline interactions, and distribute workload among staff in an equitable manner |
| 50 | NC | E | <p>Underwriting Management</p> <ul style="list-style-type: none"> • Oversee underwriting to ensure consistent and fair practices and applications of the department's underwriting policies. • Oversee all processes related to underwriting. Keep up to date on market trending and program changes that might require change to underwriting criteria. • Direct the development and training of all loan specialists in conjunction with program managers. • Develop analytics to keep senior management informed on projects, their negotiation, and how they are progressing. • Formulate and implement policies and procedures for the underwriting team and develop long-range goals and short-range operational objectives. • Communicate clearly and effectively, orally and in writing, with underwriting staff, housing advocacy groups, developers, and local, state, and federal officials to resolve problems, and to formulate and discuss underwriting policies and procedures. <p>Develop and prepare the biennial budget and allocate interim budget requests.</p> <ul style="list-style-type: none"> • Present budget requests to the Legislature; manage execution of the approved budget to ensure adherence to budgetary goals. |

| | | | |
|-----|---|---|---|
| | | | <p>Monitor and approve monthly expenditures to ensure financial control.</p> <ul style="list-style-type: none"> • Review and report on the underwriting unit's Key Performance Measures. • Formulate and implement policies and procedures for the underwriting unit and develop long-range goals and short-term operational objectives. <p>Prepare and implement unit budget allocations; monitor expenditures as the year progresses and make adjustments accordingly.</p> |
| 15 | N | E | <p>Systems Analysis, Development, and Improvement</p> <ul style="list-style-type: none"> • Work with the Section Manager on the implementation of systems designs that will enhance the ability of staff to more efficiently and effectively deliver resources from grants, tax credits, etc. while maintaining the department's fiduciary responsibilities. (These efforts may entail the supervision of a contracted systems analyst and will require the analysis of risk related to documentation and processes when related to creating work efficiencies.) • Evaluate and implement program designs that improve the loan, grant, and tax credit product performance and efficient delivery both internally to other sections and divisions and externally to the customer and other funders. • Develop systems to maintain accurate allocations and expenditure records through subordinate staff. • Implement systems changes as needed to improve efficiency while maintaining effectiveness and process integrity. |
| 5 | N | E | <p>General Administrative Duties; Section and Department Representative</p> <ul style="list-style-type: none"> • When assigned to do so, speak for the Department as its representative in working with federal and state agencies, local governments, advisory committees, housing industry groups, and the public on housing programs, projects, and issues. • Speak at (and at times, may chair) meetings representing the Department, promoting the Department's position, and developing a consensus among groups. • As a part of the Department's management team this position will speak at and otherwise participate in manager's meetings, interdivisional meetings, Finance Committee meetings, State Housing Council meetings, portfolio management meetings, Leadership Team meetings, and perform other duties as assigned. |
| 100 | | | |

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office cubicle environment with numerous distractions, and a special need to be aware of privacy regarding personnel issues. May work beyond normal work hours as necessary to meet peak workload demands. Public speaking before large and small groups. Working with other state agencies and municipalities. This position may involve occasional travel on official State business.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Oregon Administrative Rules; Oregon Revised Statutes; HOME Investment Partnership Act Final Rule; Federal Housing Laws and Regulations; Fair Housing Regulations; OMB Circulars; Internal Revenue Code; Private Letter Rulings; Technical Advice Memoranda; and Collective Bargaining Agreement.

b. How are these guidelines used?

Extensive knowledge of the above guidelines is needed to perform the daily demands of this job. Federal regulations and State statutes are researched, interpreted, and used to develop and implement Department program policies as well as to ensure program compliance. Administrative rules, statutes, OHCS policies and procedures provide parameters by which Department must operate its programs and are referenced to answer complex questions, address specific situations, and provide specific information on housing issues.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

| Who Contacted | How | Purpose | How Often? |
|--|---|---|------------|
| <i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i> | | | |
| Local, State, Federal Officials; Housing Industry and Advocacy Groups; the Public | Phone/Letters/ email/ Personal Visits/ Public Presentations | Provide program information; discuss and develop housing policies and procedures | Daily |
| Lending institutions, equity Investors and other Financial partners | Phone/Letters/ Personal Visits/email | Discuss program policies/procedures, investigate program alternatives, resolve problems | Daily |
| Attorneys and third-party consultants | Phone/letter/email | Review laws and regulations to assure program compliance | Monthly |

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

The Underwriting Unit Manager is responsible for supervisory and management decisions relative to the section's underwriting policies and closing procedures, establishes procedures to ensure compliance with federal and state statutes and regulations, and advises the Section Manager of decisions regarding underwriting policies. Initiates changes in existing processes and procedures or implements new processes to provide clarity in the underwriting of agency programs.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

| Classification Title | Position Number | How | How Often | Purpose of Review |
|----------------------|-----------------|-------------------------|-----------|---------------------------------|
| PEME | 0001141 | Phone, email, in person | Regularly | Update; Discuss issues/problems |
| PEME | 0001141 | In Person | Annual | Performance Review |
| | | | | |

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 8

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- Plans work Assigns work Approves work
 Responds to grievances Disciplines and rewards Coordinates schedules
 Hires and discharges Recommends hiring Gives input for performance evaluations
 Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

At Oregon Housing and Community Services:

- Our **Vision** is that all Oregonians have the opportunity to pursue prosperity and live free from poverty.
- Our **Mission** is to provide stable and affordable housing and engage leaders to develop integrated statewide policy that addresses poverty and provides opportunity for Oregonians.
- Our **Core Values**: Collaboration – Compassion – Equity – Integrity – Leadership – Transparency.

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

The individual in this position is expected to (a) create a professional environment focused on high productivity; (b) model sound work habit through personal example and leadership; (c) maintain accurate and current office records (time sheets, travel expenses records, weekly reports, etc.) and submit these for appropriate action in timely manner; (d) actively contribute, participate, and engage in department meetings and other settings; and (e) complete special projects and other duties as assigned.

The individual in this position must perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully; actively engage in and promote a positive work environment; develop good working relationships with agency personnel, other state agencies, and with appropriate external partners/stakeholders; identify and resolve problems in a constructive manner; demonstrate openness of constructive feedback and suggestions; and contribute to a positive, respectful, and productive work atmosphere creating a positive, productive environment focused on results.

The person in this position must have excellent written and verbal communication and presentation skills as well as computer skills. Punctuality and regular, consistent attendance are key elements of this position.

The person in this position must operate on his or her own initiative to investigate and evaluate complex information, and act to resolve problems, and must freely communicate with subordinate staff, the Director, the Assistant Director of Housing Finance, and the Section Manager in performing the duties of the job.

This position is critical to developing the state's housing stock. The Underwriting Unit Manager must be able to work independently, think analytically and creatively, and communicate clearly and effectively with a wide range of persons on technical information and policy issues. This requires extensive technical knowledge of housing, housing programs, building construction, land use law, contract administration, and technical writing.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

| Operating Area | Biennial Amount (\$00000.00) | Fund Type |
|----------------|------------------------------|-----------|
|----------------|------------------------------|-----------|

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

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SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority Signature

Date