

CITY OF MADISON POSITION DESCRIPTION

1. Name of Employee (or "vacant"):
2. Work Phone:
3. Class Title (i.e. payroll title):
Community Development Technician
4. Working Title (if any):
Community Development Technician:
Compliance, Asset Management & Finance
5. Name & Class of First-Line Supervisor:
Susan Morrison, Community Development Grants Supervisor
Work Phone: 266-1053
6. Department, Division & Section:
Department of Planning and Community and Economic Development, Community Development Division,
CDBG (Community Development Block Grant) Unit
7. Work Address:
215 Martin Luther King Jr. Blvd., Room 280, Madison, WI 53703
8. Hours/Week: 38.75
Start time: 8:00 a.m. End time: 4:30 p.m.
9. Date of hire in this position:
00/00/00
10. From approximately what date has employee performed the work currently assigned:

11. Position Summary:

This is a responsible, para-professional and technical position in the Community Development Division. The position works under the direction of the CDBG unit's Community Development Supervisor or designee, and collaborates with Community Development Specialists to provide support for project management activities. The position is responsible for a diverse range of compliance, asset management and financial management work.

Specifically, the position is responsible for the management and maintenance of the Division's portfolio of installment and deferred payment loan assets; management of financial operations related to the Division's various lending programs; preparation and analysis of asset and lending reports to support Division lending staff; creation of GIS maps and analysis of related data; and management of the Division's rental housing asset portfolio to ensure compliance with local, state and federal regulations.

Assignments are received from the Community Development Supervisor, and the employee is responsible for the completion and accuracy of the work.

12. Functions and Worker Activities (Do NOT include duties done on an out of class basis).

- 30% A. Maintain the Division's asset portfolio management system and participate in system conversion activities as necessary.
1. Assist in the development and maintenance of complex computerized accounting, financial and reporting systems.
 2. Using MUNIS, the City's financial management system:
 - review and process revolving loan disbursements and receipts;
 - maintain and reconcile loan systems.
 3. Analyze monthly servicing reports from US Bank and create payment batches in Tyler Cashing.
 4. Create general invoicing in MUNIS and track monthly/quarterly/annual loan payments associated with direct payment installment loans.
 5. Prepare loan documentation for storage - both electronically in the central electronic system and in hard copy as part of the original legal document file. Follow up with title companies, Register of Deeds and/or Community Development Specialists as needed for documentation and verification.
 6. Maintain and assist in the development of policies and procedures related to loan servicing (payoffs, subordinations and new lending).
 7. Work in coordination with City Finance to create charge code accounts for payoffs.
- 25% B. Manage loan servicing associated with the Division's asset portfolio, comprised of loans from such sources as the City's Affordable Housing Fund and Affordable Housing Trust Fund, federal HOME and Community Development Block Grant funds, etc.
1. Evaluate and prepare payoff requests, subordinations and verification of mortgages.
 2. Complete annual risk assessments for all outstanding loans in asset portfolio
 3. Work in coordination with City Attorney's office to track and monitor foreclosure actions taken on any properties in the Division's loan portfolio.
 4. For applicable development projects, review annual cash flow statements to make determinations regarding cash flow sufficiency and possible need to make loan payments.
 5. Develop semi-annual reconciliation reports to ensure accurate correlation of Division's loan database with MUNIS.
 6. Coordinate with City Finance regarding annual city-wide financial audit and prepare necessary written responses to contracted auditors.
- 20% C. Develop CDBG unit data-focused reports and analysis per funder requirements.
1. Prepare quarterly financial reports for various State of Wisconsin funded programs such as Housing Cost Reduction Initiative (HCRI) and Neighborhood Stabilization Program (NSP)
 2. Provide regular asset and loan reports, including analysis, to Community Development Supervisor or designee.
 3. Prepare required financial reports for agencies such as Housing and Urban Development (HUD), Department of Energy (DOE), etc.
 4. Reconcile program income balances for CDBG unit programs and prepare regular program income reports and analysis by program area.
- 15% D. Complete compliance-related work associated with the Division's portfolio of rental housing projects. Work involves understanding and ensuring compliance with local, state and federal regulations.
1. Perform annual desk review of leases, tenant selection plans, affirmative marketing plans, and rent rolls for compliance with local, state and federal rental regulations and

requirements, and develop reports for Community Development Supervisor and Specialists.

2. Perform annual desk review of project financial viability based on agency financial reports.
3. Perform annual on-site monitoring of agency tenant files and interview tenants to verify compliance with federal rental program regulations and develop related reports for the Community Development Supervisor and Specialists.
4. Communicate with agencies regarding their compliance or non-compliance with local, state and federal regulations, and in the case of non-compliance, coordinate with agencies to ensure execution of remedies for non-compliance.
5. Provide compliance analysis and summary reports to the Community Development Supervisor.

5% E. Support efforts to manage and maintain content of Community Development Division website and social media communications.

1. Work in consultation with City of Madison Information Technology Department staff to maintain Community Development Division website.
2. Organize and post content on Division website, including plans and reports, public notices, as well as policy committee meeting schedules, agendas – all in conformance with City standards and website policies.

5% F. Other Duties as Assigned

1. Participate in various Unit and Division initiatives as needed.
2. Perform specialized research as needed by Community Development Supervisor and Community Development Specialists.

13. Desired knowledge, skills and abilities:

Knowledge of accounting and lending principles, theory, procedures and terminology; ability to prepare and reconcile accounting records using various software/database applications; ability to perform related mathematical computations; working knowledge of relational databases, data collection methods, and data analysis techniques. Basic knowledge of local, state, and federal community development grant programs, contract administration and related regulations. Ability to interpret and implement local, state and federal regulations pertaining to rental housing standards. Working knowledge of computer database software and Microsoft Office Suite (Word, Excel, PowerPoint). Ability to organize facts and present them clearly in written and graphic form; ability to communicate effectively both orally and in writing; ability to maintain effective working relationships, ability to maintain adequate attendance. Ability to plan, organize and complete work assignments in an accurate and timely manner. Ability to work independently with grantees and local agency staff.

14. Special tools and equipment required:

Computer with various computer software programs

15. Required licenses and/or registration:

None

16. Physical requirements:

Ability to sit at a desk for extended periods of time
Ability to look at a computer screen for extended periods of time

17. Supervision received (level and type):

Works under the general supervision of the Community Development Supervisor.

18. Leadership Responsibilities:

This position: is responsible for supervisory activities (Supervisory Analysis Form attached).
 has no leadership responsibility.
 provides general leadership (please provide detail under Function Statement).

19. Employee Acknowledgment:

I prepared this form and believe that it accurately describes my position.
 I have been provided with this description of my assignment by my supervisor.
 Other comments (see attached).

EMPLOYEE

DATE

20. Supervisor Statement:

I have prepared this form and believe that it accurately describes this position.
 I have reviewed this form, as prepared by the employee, and believe that it accurately describes this position.
 I have reviewed this form, as prepared by the employee, and find that it differs from my assessment of the position. I have discussed these concerns with the employee and provided them with my written comments (which are attached).
 I do not believe that the document should be used as the official description of this position (i.e., for purposes of official decisions).
 Other comments (see attached).

SUPERVISOR

DATE

Note: Instructions and additional forms are available from the Human Resources Dept., Room 501, City-County Bldg. or by calling 266-4615.