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DRAFT

OFFICE OF FIELD OPERATIONS

Field Operations Manager

GS-0301-15

INTRODUCTION

This position is located in the Office of Multifamily Housing Programs, in the Front Office of the Deputy Assistant Secretary (DAS) for Multifamily Housing Programs. The incumbent of this position serves as the Field Operations Manager and principal advisor to the DAS and other key Headquarters staff for all matters related to the field management and operations of Multifamily programs. The incumbent provides oversight and direction in the execution of the Departments plans and priorities at the field level, distribution of staff, staff development and execution of EEO and affirmative action policies. The incumbent acts as the first line supervisor for the Hub Directors in Multifamily's five Regional Hubs.

MAJOR DUTIES AND RESPONSIBILITIES

- Principal advisor to the DAS with respect to development of strategies to accomplish Multifamily priorities and negotiate these strategies for the DAS with field Hub Directors.
- Develops the Multifamily portion of the Management Plan Goals after consultation with HQ Directors of Multifamily program offices.
- Provides advice, analysis and recommendation to the Assistant Secretary on field progress in carrying out the Management Plan.
- Develops and monitors Multifamily HUDStat goals. Represents Multifamily field operations in HUDStat meetings and coordinates HUDStat meeting participation by HQ Program Directors.
- Develops plan for allocation of staff resources necessary to carry out Multifamily programs and functions in the Regional Hubs. Serves as principal advisor to the DAS on field staffing issues.
- Advises the DAS regarding selections for key Multifamily positions in HUD's field offices.
- Collects and organizes selective data preparatory to recommending performance rating for field office directors.
- Prepares allocation and distribution plans for travel funds, training funds and equipment.
- Monitors the use of field resources. Initiates and conducts studies to determine Multifamily field staffing and support resource needs.
- Provides management advice and guidance to Multifamily Hub Directors Directors on a wide variety of program management, and operation issues.
- Conducts field management reviews, including local government field interviews and studies to determine the quality of services provided by field office personnel.

- Makes recommendations to the DAS to improve field office organization and management of Multifamily programs and functions, and provides follow-up to assure that appropriate actions were taken.
- Coordinates work of Multifamily Hub Directors to collect, assimilate, and aggregate data for critical reports for the Secretary, Assistant Secretary, DAS and or Congress.
- Reviews, tracks, and direct disposition of all correspondence to the DAS for field office related issues to program and resource management.
- Reviews correspondence from program offices to field offices to assure that content is consistent and that guidance does not interfere with establish priorities.
- Represents field offices in Headquarters with respect to disposition of field issues.
- Plans, coordinates, and or executes nationally and regionally based conferences, workshops, meetings and forums.
- Develops systems and procedures to enable field offices to demonstrate their accomplishments in meeting management plan goals.
- Participates in the resolution of disputed participant and program audit findings with the Office of the Inspector General.
- Monitors and evaluates training sessions provided to Multifamily field staff and recommends methods for improving training to the DAS and HQ Program Office Directors.
- Provides technical support to the field.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Skill in planning, organizing, and directing team study work and effectively negotiating with management to gain acceptance and implementation of recommendation, where the proposals may involve substantial agency resources, require extensive changes in established procedures, or be in conflict with the desires of the activity studied.
- Expert knowledge in the application of a wide range of qualitative and or quantitative methods for the assessment and improvement of program effectiveness or the improvement of complex management processes and systems.
- Knowledge of a comprehensive range of policies, regulations, and precedents applicable to the administration of one or more important public programs.
- Knowledge of agency program goals and objectives, the sequence and timing of key program events and methods of evaluating the value of program accomplishments.
- Knowledge of relationships with programs and key administrative support functions within between separate agencies.

FACTOR 2 - SUPERVISORY CONTROLS

The employee is typically delegated complete responsibility and authority to plan, schedule, and carry out major projects concerned with the analysis and evaluation of programs and organizational effectiveness. Analyses, evaluations, and recommendations developed are

normally reviewed by management officials only for potential influence on broad agency policy objectives and program goals.

FACTOR 3 - GUIDELINES

Guidelines consist of basic administrative policy statements concerning the issues or problem being studied. The employee uses judgment and discretion in interpreting and revising existing policy regulatory guidance for use by others. Some assignments may involve the review of proposed policies and regulations that would significantly change the base character of the way the agency conducts its business with the public or with private industry. Develops study formats for use by others on a project team or at subordinate echelons in the organization.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies that require effectiveness, efficiency and productivity of substantive mission-oriented field operations. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives. Options, recommendations, and conclusions developed take into account, and give appropriate weight to, uncertainties about the data and other variables that effect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to evaluate major management operational aspects of substantive, mission-oriented programs. The work involves identifying and developing ways to resolve problems or address issues that directly affect the accomplishment of Departmental and program goals and objectives. Work products consist of complete decision packages and staff studies, and typically contain findings and recommendations of major significance, which serve as the basis for new administrative systems, policies or management guidance.

FACTOR 6 - PERSONAL CONTACT

Personal contacts are with HUD employees and supervisors, as well as consultants, and contractors, and other Federal agencies in an unstructured setting. Contacts may include contact with the head of the agency (e.g. office manager) or program officials (e.g. Directors from other divisions or Regional office staff), and clients. Contacts are with high-level officials of Federal, State and local governments.

FACTOR 7 - PURPOSE CONTACT

Contacts are made to influence managers or other officials to implement the requirements of Federal programs compliance for effectiveness. The issues being dealt with will often require great skill in negotiating among competing community and organizational interests. The purpose of these contacts involve representing the office, Department and the Federal government at professional conferences, summits, forums, trainings to convey policy initiatives and asses the views and concerns of the clients, advocates, service providers, local governments and the public concerning programs and policies.

The purpose of the contacts is to exchange dialog and to provide persuasion in influencing local groups to accept the Departments point of view or policy position regarding Multifamily programs. The purpose of the contacts also involves presenting HUD's goals and viewpoints on behalf of management at professional conferences, summits, forums, standing committees and meetings convened to deal with a wide variety of issues of considerable consequence or importance.

FACTOR 8 - PHYSICAL DEMANDS

No unusual physical exertion is required.

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an office setting.

DRAFT

Hub Production Branch Chief

GS-1101-15

INTRODUCTION

The incumbent for this position is located in the Multifamily Hub, and reports to the Hub Director. Incumbent acts as Hub Director in their absence. The position requires an executive level of knowledge and professional judgment of commercial real estate finance, production, as well as asset management, and a detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination and servicing of FHA-insured multifamily mortgages. It also requires a strong working knowledge of the Low Income Housing Tax Credit Program (which is overseen by the IRS and states' housing finance agencies) in order to advance FHA insurance activity for projects financed with both Housing Tax Credits and FH-insured debt, as well as the Project Based Section 8 programs.. The incumbent serves as the principal advisor to the Hub Director and to HUD Headquarters Senior Management, and is the primary responsible official within a regional geographic jurisdiction in matters related to HUD's various Multifamily Production programs. While acting as a representative of HUD and the Multifamily Hub, the position requires independent action in making determinations, recommendations, and investigations that involve these program areas. The incumbent is responsible for the activities and workload assignments of teams of Underwriting and Technical Specialists under their supervision. Such supervisory responsibility includes first line Production supervisors, Senior Underwriters, Technical experts such as Appraisers, Architects, other analysts and support staff.

MAJOR DUTIES AND RESPONSIBILITIES

- The incumbent directs the supervisory staff who manage the professional, technical, and clerical staff required to support FHA's Multifamily mortgage insurance, Risk Share, and other development and financing activities for both affordable and market rate housing.
- They are the primary official within the Hub responsible for implementation of HUD's multifamily financing programs and management of the transaction pipeline within their jurisdiction through the development and construction phase.
- The underwriting and technical specialist teams under their direction are responsible for managing the efficient and effective coordination and accomplishment of planning, scoping, development design, construction, and operation of major multifamily insured and capital advance projects.
- The incumbent applies extensive knowledge of the construction disciplines, financial analysis, valuation, and related disciplines, development and management concepts and principles, methods and practices.
- The incumbent serves as a leader and spokesperson in relationships with the industry and other government entities, in matters relating to HUD's multifamily programs.

- The incumbent ensures quality control, oversight of management and internal controls and management reporting for all technical, underwriting and programmatic matters within their responsibility.
- Such responsibility includes high level participation in development and management of national standards and policy related to HUD's multifamily development programs, establishment of management plan goals, and for coordinating with Asset Management, Public and Indian Housing, and other offices within HUD.
- The Production Branch Chief is expected to mentor the supervisors and more junior staff, oversee training and other staff and systems development activities, manage pipeline priorities, and for particularly sensitive political or technical issues, transactions or programs, serve as HUD's primary point of contact for sponsor/customers and for all external agencies and professionals. Incumbent assures that plans and strategies are developed and implemented to effectively achieve management plan goals and objectives within available staff and other resources while managing competing objectives in light of local conditions. Incumbent monitors and evaluates progress and effectiveness in meeting goals and takes corrective actions to facilitate accomplishment of goals.

Specific duties and responsibilities include the following:

1. Serves as the principal technical resource staff person for Multifamily Hub and Program Center and HUD senior management, to provide advice and guidance on matters pertaining to statutory and regulatory requirements and other administrative directives.
2. Serves as manager of front line supervisors for a team of underwriters, analysts, processors, technical specialists, and program assistance support staff.
3. Serves as the primary focal point coordinating technical or programmatic issues related to specific transactions, pipeline and portfolio transactions, and program parameters. Serves as the senior official in the Multifamily Hub or Program Center for Production activities and programs, including underwriting, mortgage credit, appraisal, architectural, and environmental issues, and primary official responsible for quality control of the underwriting process and underwriting product of all assigned transactions.
4. Responsible for oversight and coordinating between Multifamily Production and Asset Management, and within various production, management, and offices, including the Appraisal, Architecture and Engineering, other technical specialist (e.g. Legal, Environmental).
5. Exercises supervisory oversight and responsibility for staff who serve as the primary point of contact for projects assigned with sponsor, Federal, state and local government agencies, congressional interests, other external organizations and higher authorities.
6. Represents HUD in meetings, training, industry outreach, and similar activities with lenders and other industry partners, and other governmental entities. Supervises teams that assist and

advise lenders and other professionals in structuring transactions so as to meet HUD requirements and Low Income Housing Tax Credit requirements.

7. Responsible for ensuring HUD's review deadlines are met for all projects in pipeline, assuring that workload is prioritized and scheduled, data and automated reporting systems are maintained so that work can be tracked and analyzed, and provides accurate and timely reporting of operations and activities. Incumbent makes adjustments to operations when necessitated by changing demands.

8. Develops and maintains internal management controls to prevent waste, fraud, program abuse and mismanagement, and manages responses to Inspector General and other audit reports.

9. Responsible for supervisory and staff compliance with all Federal employment rules, regulations, and standards including but not limited to mandatory training, non-discrimination, information security, privacy considerations, and personnel management requirements.

FACTOR LEVELS

FACTOR 1 – KNOWLEDGE REQUIRED

- Overall knowledge of HUD Housing regulations and program functions, and contracting and funding procedures. Expert knowledge of Multifamily Housing's structure, mission, policies, programs, functions, and their organizational relationships.
- Skill in monitoring work operations to evaluate results, identify problem areas, and make improvements regarding program performance.
- Knowledge of management information systems and automated programs for data analysis.
- Ability to give oral and written presentations and deal with the public and government officials on complex or sensitive issues.
- Ability to direct and coordinate the work of a subordinate staff to accomplish goals and meet deadlines while applying sound personnel management and equal opportunity principles and practices.
- Knowledge of the Union Contract and ability to deal with diverse parties in order to develop rapport and negotiate effectively to resolve conflicts.
- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for origination of new construction, substantial rehabilitation, refinancing and acquisition of existing market rate or subsidized apartments, and restructuring mortgage debt for multifamily distressed or subsidized housing. Knowledge of real estate appraisal, title surveys, environmental reviews, property condition assessments, and mortgage restructuring practices.
- Ability to direct and coordinate the work of subordinate staff to accomplish goals and meet deadlines while applying sound personal management and equal opportunity principles and practices. Knowledge of Union Contract(s) and the ability to deal with

diverse parties in order to develop rapport and negotiate effectively to avoid, and where necessary resolve, conflicts.

- Knowledge of work and task distribution to improve efficiency in Underwriting program activities and operations.
- Expert understanding of how HUD's mortgage insurance program is administered and the principles of underwriting utilizing practices and procedures common to organizations in the field of real estate lending.
- Ability to determine if Underwriting program activities are appropriate, evaluate them for their efficiency and determine how to design/redesign them to meet the program's mission, goals, and risk management standards.
- Ability to communicate effectively on technical subjects both orally and in writing.
- Expert skill in applying the full range of multifamily real estate lending and appraisal techniques and risk-rating criteria required in order to determine if a loan to a property owner secured by real property can be insured by the Federal Housing Administration.

FACTOR 2 – SUPERVISORY CONTROLS

The incumbent reports directly to the Hub Director.

The incumbent is considered a leader in the field of multifamily production and underwriting and is expected to independently carry out assigned duties with completeness, accuracy, and mature professional judgment. The incumbent receives only general direction and has wide latitude in directing and managing areas within their responsibility throughout their jurisdiction, and thus must be able to exercise a high degree of independent, sound and seasoned judgment in order to achieve goals and objectives in a manner consistent with agency standards and practice.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to deal with unique or controversial issues. The incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application in resolving jurisdictional problems, conflicts and issues.

FACTOR 4 – COMPLEXITY

The incumbent of this position requires the application of an advanced practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his her grade to arrive at a reasonable, workable and good decision. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation throughout the jurisdiction of the Hub.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of FHA and Housing production program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level for the multifamily real estate financing pipeline and portfolio. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, mortgagors, resident organizations, and local government officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; exchange information, resolve differences, and serve to enhance Department public relations. Frequently, compromise solutions or positions must be reached.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effects may be required.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

Management Analyst (Operations)

GS-0343-13

INTRODUCTION

This position is located in the Multifamily Deputy Assistant Secretary's (DAS) Front Office and reports directly to the Field Operations Manager, also located in that office.

The Office the Multifamily DAS is responsible for developing, implementing, and maintaining the mortgage insurance and multifamily housing programs and related functions for production, financing, and management of such housing and the conservation and rehabilitation of housing stock or related regulatory functions

MAJOR DUTIES AND RESPONSIBILITIES

Incumbent provides Program support and assistance and performs the following specific functions:

- Researches and investigates new or improved business and management practices for application to Housing programs and operations.
- Identifies data required for use in the management and direction of programs.
- Develops management plans, procedures, and methodology;
- Conducts complex and special studies for efficiency and productivity and recommends changes or improvements in work methods, and procedures.
- Develops procedures and systems for establishing, operating, and assessing the effectiveness of administrative control systems.
- Analyzes and evaluates Multifamily Housing functions and activities being considered for conversion to contract operations.
- Identifies resources (funding, equipment, facilities) required to support varied level of program operations.
- Reviews administrative audits and investigative reports to recommend appropriate changes or corrective action required.
- Defines, plans, develops, and implements controls and procedures for the organizations in Headquarters and the Field structures.
- Performs extensive and in-depth reviews for a more efficient and effective mission and function.
- May serve as a team leader or member in developing and or implementing improvements to the mission function of the organization in its Headquarters and Field structure.
- Develops and implements management procedures and policies in Housing Headquarters and it Field structure.
- Conducts special cost benefits analyses, studies, reports, surveys, inquiries, and evaluations.

- Prepares oral and written reports and presentations; prepares graphs and charts that present clear, concise, and effective analytical results of, evaluations and studies performed; provides staff level with formal presentations.
- Prepares replies to inquiries from Members of Congress, other Government agencies, Field Offices, Contractors, and the general public on very complex and substantive questions relating to Housing's operations and management.
- Represents the office, as needed, in meetings, workshops and conferences.
- This position may have access to sensitive HUD systems at the supervisor's discretion and as identified in the Management Survey
- Drafts responses to correspondence assigned to the office. -Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert Knowledge and mastery of the application of a wide range of qualitative or quantitative methods for assessing and improving effectiveness.
- Expert knowledge of the range of administrative laws, policies, regulations, and precedents applicable to the Housing's programs.
- Expert knowledge of Housing's program goals and objectives, the sequence and timing of key program events and milestones, and methods of evaluating the worth of program accomplishments.
- Expert knowledge of relationships with other programs and key administrative support functions within Housing.
- Expert knowledge of the organizational structure, functions and procedures of Housing, and their relationships with the other program areas of the Department.
- Expert knowledge and ability to design and conduct comprehensive management studies of housing programs.
- Expert knowledge and ability to assemble and analyze relevant facts and draw significant conclusions.
- Expert knowledge and skill in presenting accurate findings and the ability to make feasible and responsive recommendations both orally and in writing. These recommendations may require negotiations with management to accept extensive changes in established procedures or they may involve substantial resources.
- Expert knowledge and skill in the use of computers.

FACTOR 2 - SUPERVISORY CONTROLS

Within a framework of priorities, funding and overall project objectives, the employee and Supervisor develop a mutually acceptable project plan. The employee is responsible for planning and organizing the study, estimating costs, coordinating with staff and line management personnel, and conducting all phases of the project. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with

organizational goals, guidelines, clarity of presentation, soundness of conclusions and effectiveness in achieving intended objectives.

FACTOR 3 - GUIDELINES

The incumbent is guided by oral instructions; laws decisions, rules and regulation governing Housing and related programs; overall HUD management policies; and standard management principles and practices. The existing studies and policies must often be revised to accomplish the project goals. Within the context of broad regulatory guidelines the employee may refine or develop more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness and productivity in the administration of operating programs.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies, which require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of a specific Housing program, and or developing criteria for evaluating its effectiveness. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services. Assignments are further complicated by: the need to deal with subjective concepts such as value judgments; the quality and quantity of actions are measurable primarily in predictive terms; and findings and conclusions are highly subjective and not readily susceptible to verification through replication of study methods or reevaluation of results. Options, recommendations, and conclusions developed by the employee take into account and give appropriate weight to uncertainties about the data and other variables, which affect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs and to ensure that the Secretary and Assistant Secretary receive timely, accurate and complete data and project information for use in conjunction with out-of-town travel, meeting, speeches and other events. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or evaluating the effectiveness of programs. The work involves identifying and developing ways to resolve problems or cope with issues, which directly affect the accomplishment of principal program goals and objectives. The work involves assisting in establishing criteria for assessing program effectiveness; reviewing, investigating and analyzing a variety of unusual conditions. Work also ensures that Housing's policies, legislation and research programs are consistent with Housing programs and Departmental priorities and that their impacts are fully described and understood.

Study reports typically contain findings and recommendations of major significance to HUD's top management, and often serve as the basis for new administrative systems, legislation,

regulations, or programs. The end product of the incumbent affects the internal operations of HUD, HUD's interaction with other entities in the housing field, and the operation of housing programs by other housing-related government agencies.

FACTORS 6 AND 7 - PERSONAL CONTACTS AND PURPOSE OF CONTACTS

Contacts within the Department are primarily for the purpose of obtaining program or project-related data and information and for exchanging views on Housing policies, legislation and research, which affect various Housing programs. Contacts are made to assist in planning, coordination, providing advice to resolve operating problems, and to influence managers or other officials to accept and implement findings and recommendations on organizational improvement or program effectiveness. Incumbent may encounter resistance due to such issues as organizational conflict, competing objectives, or resource problems.

FACTOR 8 - PHYSICAL DEMANDS

The work involves some walking, standing and carrying of documents. Some exposure to weather conditions is involved when traveling in the performance of duties.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a normal office environment. May require occasional travel.

DRAFT

Production Specialist

GS-1101-11/12/13

INTRODUCTION

The position is located in the Officer of Multifamily Production in HUD Headquarters. The Office is responsible for the program management and operational aspects of field support and liaison with Multifamily Production staff in Field Office Hubs and Program Centers. The position is structured to accommodate a career path. At the GS-13 journeyman level, the position requires a mastery of various HUD Multifamily Production programs, and a detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination, underwriting, approval, and servicing of FHA-insured multifamily mortgages, as well as the Risk Share and Project Based Section 8 programs. It also requires a strong working knowledge of the Low Income Housing Tax Credit Program (which is overseen by the IRS and states' housing finance agencies) in order to advance FHA insurance activity for projects financed with both Housing Tax Credits and FH-insured debt. The position requires technical and programmatic expertise so as to make policy and program oversight recommendations, conduct research, and make fact specific determinations, recommendations, and investigations that involve these program areas. At the GS-11, and 12 levels, the Specialist will have expertise in specific program or technical disciplines, and demonstrate progressive mastery of several areas of responsibility.

MAJOR DUTIES AND RESPONSIBILITIES

- The incumbent provides programmatic and technical analysis, support, design and development of procedures and policies to oversee and implement various Multifamily mortgage insurance and assistance programs.
- He/she is responsible for managing, coordination and accomplishment of planning, scoping, development design of initiatives necessary for the efficient and effective operation of FHA multifamily insured, capital advance, and rental assistance programs.
- The incumbent is considered a technical expert in the field of underwriting and is responsible for independently implementing underwriting tasks and long-term assignments and projects.
- The incumbent must be able to exercise a high degree of independent, sound and seasoned judgment.
- At the journeyman level, the incumbent applies extensive knowledge of one or more of the technical disciplines (construction, architecture engineering and cost, appraisal) or underwriting and program areas (mortgage credit, underwriting, and programmatic policy expertise), development and management concepts and principles, methods and practices.
- The position requires broad experience in various functions, a full and in-depth understanding of HUD Asset Production, financing and lending principles, as well as a working knowledge of Asset Management, procedures and guidelines, and government contracting and budget processes.
- The incumbent serves as a point of contact for other HUD Headquarters and Field Office staff and managers, external agencies, and industry representatives, providing

authoritative guidance in interpreting outstanding policy and technical guidance for FHA multifamily insured and HUD assisted programs.

Specific duties and responsibilities include the following:

1. Serves as technical resource staff person for Multifamily Production Division Director, to provide advice and guidance on matters pertaining to statutory and regulatory requirements and other administrative directives. Prepares and develops policy, guidelines, procedures and regulations to provide field offices with guidance on covered areas.
2. Resolves individual transactional or programmatic issues and interprets regulatory and policy issues.
3. Serves as the point of contact with representatives of the industry, Federal, state and local government agencies, congressional interests, other external organizations and higher authorities. Prepares and assists in presentations at industry meetings (e.g. MBA, NAHB).
4. Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
5. Plans and prepares contract documents related to performance or implementation of Multifamily Production or related program initiatives.
6. Originates correspondence to address inquiries from lenders, industry, field offices, members of Congress, and individual members of the public which require sophisticated analysis and responses about complex issues.
7. Provides support in the context of waivers, appeals, loan approval, and technical or programmatic issues. Evaluates and oversees third party contract management and assigns, reviews and analyzes, coordinates and reconciles complex third party reports such as appraisals and environmental assessments. Reviews transaction appeals, waivers, or loan approval requests in detail, identifying weaknesses, if any, confirming internal consistency of findings, and comparing findings with those of other sources, if any. Analyzes creditworthiness of key principals and production team members, the financial projections reviews project's operating budgets against applicable HUD database information, industry or local standards, and expenses of other comparable projects. Analyzes the proposed sources and uses of funds, and tests and confirms that all FHA underwriting standards, such as loan to value ratios and debt service coverage ratios are achieved.
8. Evaluates performance of lenders and third parties in coordination with Lender Qualification and Monitoring Division, Office of Risk Management, Asset Management, the Office of Inspector General, Mortgagee Review Board, and other offices within or outside of HUD. Conducts and directs the development of technical training and instructional material to assist HUD Field Office personnel and industry representatives.

9. Provides technical analysis including position or option papers on various program and technical areas, including specialized problem areas of a priority nature. Monitors, tracks, and is responsible for Policy Production including various compliance with Administrative Clearance, Paperwork Reduction Act and similar requirements.

10. Oversees, analyzes, monitors data systems, reporting, procurement, funding control, training, audit responses, and budget authority requests and tracking in support of Multifamily Production activities, compliance with credit reform and budget policy.

FACTOR LEVELS

FACTOR 1 – KNOWLEDGE REQUIRED

General knowledge of:

- Multifamily Housing's Programs, structure, mission, policies, functions, and their organizational relationships.
- Work and task distribution to improve efficiency of policy and program support and operations
- Analytical and evaluative methods for real estate finance.

Expert knowledge of more than one of the following specialized areas:

- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for restructuring mortgage debt for multifamily subsidized housing.
- Commercial Multifamily Real Estate Appraisal.
- Architecture, Engineering, Cost, Construction management, property condition assessments,
- Real Estate and business law including securitization, Title and survey requirements.
- Environmental review, analysis and requirements.
- Mortgage Credit, Construction Loan Administration, and Financial Analysis.
- Risk Management and Asset Management.
- Tax Credit and other HFA or local agency administered financing programs.

FACTOR 2 – SUPERVISORY CONTROLS

The incumbent is under the general supervision of the Division Director, and may also work under the guidance of a Senior Multifamily Production specialist or Senior Production Advisor. The incumbent schedules and carries out projects concerned with planning, coordination, implementation, analysis, and evaluation of underwriting, technical, or programmatic imitative for Multifamily Housing Production, and is accountable for quality and timeliness of completed project deliverables and work product.

Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organization goals, guidelines, and effectiveness in achieving intended objectives.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to issues and problem studies. Within the context of broad regulatory guidelines, the incumbent may redefine or develop more specific guidelines or methods for the implementation of program support activities, programs or methods, and improve the effectiveness in the administration of such activities.

Under the supervision and guidance of more senior staff and managers, the incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application.

FACTOR 4 – COMPLEXITY

Success in execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate, and perform various complex and difficult tasks. Assignments require detailed plans and goals for implementing a specific program strategy and/or developing criteria to evaluate the effectiveness of a given approach or set of procedures. Assignment requires independent research, assessing many issues, and then developing a proposed course of action as the result of reviewing various alternatives.

The work requires the selection and use of different analytical techniques, methods, and procedures in analyzing, revising, and formulating underwriting recommendations that meet program goals, objectives, and timetables. The incumbent is required to exercise considerable judgment in the selection, interpretation, and application of guidelines; in meeting timetables and dealing with others; and ensuring that the myriad of laws, rules and regulations concerning subsidized housing, financial transactions, architecture, engineering, cost, environmental, and real estate appraisal, are integrated in the underwriting process.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of FHA multifamily mortgage insurance and other housing development program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level, and affects the plans, goals, and effectiveness of missions and programs at various echelons or locations within HUD. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining or clarifying information, gathering facts, resolving issues, coordinating and devising new or revised program strategies, to present alternative approaches and view points, and to influence managers and other officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, accomplished while seated at a desk, or working with files. No special physical effects are required to perform the work.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

DRAFT

Senior Account Executive

GS-1101-11/12

INTRODUCTION

The incumbent of the position is located in the Multifamily Hub/Program Center and is supervised by the Supervisor in the Hub/Program Center. In order to fulfill the roles and responsibilities of this position, the incumbent will need extensive and detailed practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs. While acting as a representative of HUD and the Multifamily Hub/Program Center, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas.

MAJOR DUTIES AND RESPONSIBILITIES

- Understand and evaluate new developments in the market place that could have a potential impact on the business and look for opportunities to enhance our business practices to adapt to market changes.
- Provide recommendations to management on how to adjust the business strategy to adapt to changing market conditions. Provide lenders and stakeholders with excellent customer service.
- Ensure that all policies and procedures are properly observed, all transactions are conducted with authorized personnel, all records and contracts are complete and up to date, and all customer position limits/risk tolerances are observed.
- Lead team discussions, prepare management reports, represent the Department in internal discussions with key stakeholders, and provide lender profiles/summaries on an “as needed” basis.
- Provide guidance and leadership to less experienced members of the team.
- Responsible for all loan level and deal level credit decision making.
- Works with Production staff to provide input on new loan applications including information about market conditions, management agent and owner.
- Provide portfolio surveillance information to various deal stakeholders.
- Deliver accurate and timely loan and property level information to the various deal stakeholders such as rating agencies, trustees, special servicers, and bondholders.
- Monthly monitoring of the Watchlist.
- When appropriate recommend, property re-underwriting to make credit decisions.
- Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Owner/Management Agent and mortgagee.
- Monitor/communicate any potential operational risk to senior management.
- Review and approve borrower requests related to leases, collateral releases/substitutions, letters of credit, changes in property management, reserve/holdback release, loan extensions and loan modifications, etc.
- Review loan covenants such as DSCR and Repair Escrows.

- The incumbent formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. The incumbent clarifies published guidelines and explains regulatory requirements.
- The incumbent is considered a senior staff member who personally performs duties involving the most complex cases and develops solutions to issues that could not be assigned to less knowledgeable or less experienced staff. The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- Upon request of the Multifamily Hub Director or the Supervisor, the incumbent performs technical reviews of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Multifamily Hub Director, Supervisor, or to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- The incumbent assists in providing on the job training to other Branch employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to the Hub Director or Supervisor other formal and informal training needs.
- Serves as the primary point of contact for projects assigned with sponsor customer, owner/management agent, Federal, State and local government agencies, congressional interests, other external organizations and higher authorities. Responsible for keeping the sponsor/owner/agent/customer fully informed of project progress, issues and their resolution, and any impacts on costs. Assures that sponsor customer or other agencies participation in the project is in accordance with the agreed upon management plan maintained, and resolves sponsor customer problems or issues in the most appropriate manner. Responsible for the development of all required sponsor customer and HUD agreements, leading the negotiation of such agreements on the part of the Department.
- Responsible for the transition to Asset Management as it relates to the overall project application development (processing) particularly in cases where there is a phased in or staggered occupancy of buildings, construction activity, closing and final management control, coordination and execution in accordance with HUD's published guidelines and guidance.
- Implements team decisions and guidance, applicable regulations, and policy in the development and oversight of a project.
- Negotiates and integrates all agency functions including underwriting (planning design review, cost engineering, appraisal, credit evaluation and approval) loan closing,

construction, start-up and long term management systems and sponsor customer needs of assigned project into a comprehensive procedure within the scope of asset management. Within this plan, integrates schedules and criteria, and establishes the participating parties, assumptions and risks, contingencies, and performance measurement criteria.

- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Provides input to management on operating budgets related to projects managed.
- Continues and manages project milestones and budgets from planning through construction and continuing permanent operations. Measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes invoices and draw requests to assure changes are authorized and appropriate; identifies unauthorized charges and assures corrective actions are taken for the ultimate disposition of inappropriate charges. Reviews project progress measuring performance and taking necessary corrective actions to maintain agreed upon schedule and cost. Based on performance trends, forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reconciles sponsor customer concerns, assuring that all participating parties are informed of project progress, issues, and impacts. Reviews and approves, within authorities provided, project cost and schedule changes. Manages project contingency funds to ensure efficient and effective utilization. Provide status reports on projects assigned (progress, issues, and trends) to the team.
- Oversees the assigned subsidized portfolio: Works with the PBCA, TCA and their subcontractor when appropriate to insure compliance with HUD requirements; process all contractually obligated paperwork for HUD administered contracts including PRAC properties; perform administrative oversight on the TCA and PBCA properties and provide feedback to the CAOM regarding any noted performance issues.
- Performs Management Reviews on properties in the assigned portfolio.
- Reviews and analyzes current and historic financial data; compares previous annual statements with recent financial information; analyzes current operation expenses and project financial data to form the basis of approval or denial of the following actions; rent increases, refinancing, bond refunds, prepayments, modification agreements, transfers of physical assets, changes in the corporate charter and by-laws, substitution of mortgagors, reinstatements of mortgages, budgets submitted by cooperative housing projects, and recommendations for foreclosures. Provides supporting documentation and technical arguments as part of negotiations with legal and financial professionals who act on the project owner's behalf. Review and evaluate legal documents to determine and ensure compliance with Departmental and other federal, state, and local regulations, requirements, statutes, and policies.
- Analyzes all financial statements and project operations to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenditures of

funds, adequacy of reserves, and insufficient working capital and cash flow. Initiates and follows through on any enforcement referrals.

- Works with sponsors, owners, management, and communities to assist in facilitating the development of Neighborhood Networks community learning centers and providing support for such tenant initiatives as crime control, clean-up days, day care availability, etc. Provides technical assistance to resident organizations, owners, management agents, for initiating and implementing resident involvement in the management and or purchase of HUD-Owned, HUD-Held, and Insured Multifamily Housing. Provide support for Service Coordinator program for properties in the assigned portfolio.

FACTOR LEVELS

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and extensive experience in commercial real estate specializing in multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Aggregate portfolio management experience.
- Knowledge and experience in federal housing insurance programs, federal housing assistance programs, and other affordable housing programs.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Ability to work with troubled multifamily assets.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.
- Ability to work independently in making determinations and recommendations to the Troubled Asset Specialist to rectify physical, financial, and ownership problems that cause difficulties at multifamily properties.
- Knowledge of Multifamily subsidy programs such as Section 8, PRAC, RAP, R/S

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Project Manager. The Project Manager is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Project Manager. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten

policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Production, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his/her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9:

May be received on an individual basis or as routine daily work assignments.

Supervisory Account Executive

GS-1101-13

INTRODUCTION

The incumbent of the position is located in the Multifamily Hub/Program Center and is supervised by the Director in the Hub/Program Center. In order to fulfill the roles and responsibilities of this position, the incumbent will need extensive and detailed practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs. While acting as a representative of HUD and the Multifamily Hub/Program Center, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas.

MAJOR DUTIES AND RESPONSIBILITIES

- In order to accomplish the functions of the asset servicing team, teams or employee groups consisting of account executives and senior account executives will be established.
- The incumbent serves as Supervisory Account Executive with responsibility for directing the day-to-day activities of the assigned team, including distribution and balancing of workload, tracking work progress and status, estimating and reporting on work completion, instructing the team in specific tasks and job techniques, responding to and assisting with technical issues and problems, reporting on work performance and training needs, and administering the gain and loss of employees.
- The incumbent personally performs the tasks identified below, and directs the work of team members performing similar or identical tasks, including those performing support functions. The incumbent is responsible for performing tasks typically identified as supervisory in nature, including approving leave, assigning performance elements, and standards, and rating employees.
- Manage the efficient and effective coordination of evaluating new developments in the market place that could have a potential impact on the business and to enhance our business practices to adapt to market changes. Applies extensive knowledge to adjust the business strategy to adapt to changing market conditions.
- Exercises significant authority for program operations re-delegated from the Multifamily Hub Director. The incumbent serves as a supervisor of the account executive team, with full leadership and administrative authority for the operations of the account executive team, including both goals management and performance management.
- Distributes and balances the workload including the estimation on work completion to ensure excellent customer service to lenders and stakeholder.
- Formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. Clarifies policies and procedures, published guidelines and regulatory requirements.
- Perform technical review of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the

Director or to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.

- Serves as Supervisory Account Executive responsible for all loan level and deal level credit decision making. Works with Production staff to provide input on new loan applications including information about market conditions, management agent and owner. As the Supervisory Account Executive, implements team decisions and guidance, applicable regulations, and policy in the development of a project. Negotiates and integrates all agency functions including underwriting loan closing, construction, start-up and long term management systems and sponsor customer needs of assigned project into a comprehensive procedure. Within this plan, integrates schedules and criteria, and established the participating parties, assumptions and risks, contingencies, and performance measurement criteria. Responsible for maintaining the individual asset servicing timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short-range courses of action for assigned projects. Provides input to the Director on operating budgets related to assigned projects.
- Coordinates the planning, design, and compliance with portfolio surveillance information to various deal stakeholders.
- Develops solutions to facilitate maintaining the stock of affordable housing in decent, safe, sanitary, and drug-free conditions. Coordinates the physical inspection schedule for purposes of evaluating the physical conditions, maintenance, and security.
- Perform exception report reviews of the WatchList and internal quality controls of the data.
- Approve property re-underwriting to make credit decisions.
- Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Owner/Management Agent and mortgagee.
- Monitor/communicate any potential operational risk to senior management.
- Upon request of the Multifamily Hub Director or the Director, the incumbent performs technical reviews of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Multifamily Hub Director, Director, or to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- The incumbent assists in providing on the job training to other employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The

incumbent identifies and recommends to the Hub Director or Director other formal and informal training needs.

- Coordinates the transition to Asset Management as it relates to the overall project application development (processing) particularly in cases where there is a phased in or staggered placed in service date, construction activity, closing and final management control, coordination and execution in accordance with HUD's published guidelines and guidance.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Coordinates and manages project milestones and budgets from planning through construction and continuing permanent operations. Measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes invoices and draw requests to assure changes are authorized and appropriate; identifies unauthorized charges and assures corrective actions are taken for the ultimate disposition of inappropriate charges. Reviews project progress measuring performance and taking necessary corrective actions to maintain agreed upon schedule and cost. Based on performance trends, forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reconciles sponsor customer concerns, assuring that all participating parties are informed of project progress, issues, and impacts. Reviews and approves, within authorities provided, project cost and schedule changes. Manages project contingency funds to ensure efficient and effective utilization. Provide status reports on projects assigned (progress, issues, and trends) to the team.
- Reviews and analyzes current and historic financial data related project assignments; reviews the comparative to approval or denial of the following actions; rent increases, refinancing, bond refunds, prepayments, modification agreements, transfers of physical assets, changes in the corporate charter and bylaws, substitution of mortgagors, reinstatements of mortgages, budgets submitted by cooperative housing projects, and recommendations for foreclosures.
- Coordinates and manages relationships with sponsors, owners, management, and communities to assist in facilitating the development of Neighborhood Networks community learning centers and providing support for such tenant initiatives as crime control, clean-up days, day care availability, etc. Provides any coordination for technical assistance to resident organizations, owners, management agents, for initiating and implementing resident involvement in the management and or purchase of HUD-Owned, HUD-Held, and Insured Multifamily Housing.

FACTOR LEVELS

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of and extensive experience in commercial real estate specializing in multifamily housing including.

- Expert knowledge of underwriting multifamily mortgage loans
- 3-5 years supervisory experience in aggregate portfolio management.
- Expert knowledge and experience in federal housing insurance programs, federal housing assistance programs, and other affordable housing programs.
- Strong oral and written communication skills including a broad understanding of adapting these formats to various audience groups.
- Ability to perform in depth financial analysis on a multifamily property.
- Ability to direct the day-to-day work activities of a team including workload distribution and balancing to meet the needs of a rapidly changing environment.
- Expert knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.
- Ability to work independently in making determinations, recommendations, and investigations that involve a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Project Manager. The Project Manager is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Project Manager. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 – GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Production, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 - WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment.

Supervisory Troubled Asset Specialist

GS-1101-14

INTRODUCTION

The incumbent of the position is located in the Multifamily Program Center and is supervised by the Director in the Hub. In order to fulfill the roles and responsibilities of this position, the incumbent will need extensive and detailed practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs. While acting as a representative of HUD and the Multifamily Hub/Program Center, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas.

MAJOR DUTIES AND RESPONSIBILITIES

In order to accomplish the functions of the asset servicing team, teams or employee groups consisting of Troubled Asset Specialists will be established.

- The incumbent serves as Supervisory Troubled Asset Specialist with responsibility for directing the day-to-day activities of the assigned team, including distribution and balancing of workload, tracking work progress and status, estimating and reporting on work completion, instructing the team in specific tasks and job techniques, responding to and assisting with technical issues and problems, reporting on work performance and training needs, and administering the gain and loss of employees.
- The incumbent personally performs the tasks identified below, and directs the work of team members performing similar or identical tasks, including those performing support functions. The incumbent is responsible for performing tasks typically identified as supervisory in nature, including approving leave, assigning performance elements, and standards, and rating employees.
- Manage the efficient and effective coordination and accomplishment of planning, scoping, development design, construction, and operation of major multifamily insured and capital advance projects. Applies an extensive knowledge of construction disciplines, development and management concepts, principles, methods and practices as well as knowledge of methods, practices and processes of engineering and science disciplines. The position requires a broad background and experience in various functions; a full and in depth understanding of HUD Asset Production and Asset management procedures and guidelines, and government contracting processes. The incumbent is required to integrate sponsor customer requirements and participation into a fully coordinated with new developments in the market place that could have a potential impact on the business and to enhance our business practices to adapt to market changes. Applies extensive knowledge to adjust the business strategy to adapt to changing market conditions.
- Exercises significant authority for program operations delegated from the Multifamily Hub Director. The incumbent serves as a supervisor of the Troubled

Asset Specialist team, with full leadership and administrative authority for the operations of the Troubled Asset Specialist team, including both goals management and performance management.

- Distributes and balances the workload including the estimation on work completion to ensure excellent customer service to lenders and stakeholder.
- The incumbent serves as the principal technical resource staff person for the Multifamily Hub Director for advice and guidance on all matters pertaining to statutory and regulatory requirements and other administrative directives. The Hub Director must be able to place great reliance on technical information and analyses provided by the incumbent.
- Formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. Clarifies policies and procedures, published guidelines and regulatory requirements
- Perform technical review of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Director or to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- Serves as Supervisory Troubled Asset Specialist responsible for all loan level and deal level credit decision making. Works with Production staff to provide input on new loan applications including information about market conditions, management agent and owner. As the Supervisory Troubled Asset Specialist, implements team decisions and guidance, applicable regulations, and policy in the development of a project. Negotiates and integrates all agency functions including underwriting loan closing, construction, start-up and long term management systems and sponsor customer needs of assigned project into a comprehensive procedure. Within this plan, integrates schedules and criteria, and established the participating parties, assumptions and risks, contingencies, and performance measurement criteria. Responsible for maintaining the individual asset servicing timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short-range courses of action for assigned projects. Provides input to the Director on operating budgets related to assigned projects.
- Controls the planning, design, and compliance with portfolio surveillance information to various deal stakeholders.
- Develops solutions to facilitate maintaining the stock of affordable housing in decent, safe, sanitary, and drug-free conditions. Controls the physical inspection schedule for purposes of evaluating the physical conditions, maintenance, and security.
- Perform exception report reviews of the WatchList and internal quality controls of the data.
- Approve property re-underwriting to make credit decisions.

- Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Owner/Management Agent and mortgagee.
- Monitor/communicate any potential operational risk to senior management.
- The incumbent assists in providing on the job training to other employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to the Hub Director or Director other formal and informal training needs.
- Controls the transition to Asset Management as it relates to the overall project application development (processing) particularly in cases where there is a phased in or staggered placed in service date, construction activity, closing and final management control, coordination and execution in accordance with HUD's published guidelines and guidance.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Controls and manages project milestones and budgets from planning through construction and continuing permanent operations. Measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes invoices and draw requests to assure changes are authorized and appropriate; identifies unauthorized charges and assures corrective actions are taken for the ultimate disposition of inappropriate charges. Reviews project progress measuring performance and taking necessary corrective actions to maintain agreed upon schedule and cost. Based on performance trends, forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reconciles sponsor customer concerns, assuring that all participating parties are informed of project progress, issues, and impacts. Reviews and approves, within authorities provided, project cost and schedule changes. Manages project contingency funds to ensure efficient and effective utilization. Provide status reports on projects assigned (progress, issues, and trends) to the team.
- Reviews and analyzes current and historic financial data related project assignments; reviews the comparative to approval or denial of the following actions; rent increases, refinancing, bond refunds, prepayments, modification agreements, transfers of physical assets, changes in the corporate charter and bylaws, substitution of mortgagors, reinstatements of mortgages, budgets submitted by cooperative housing projects, and recommendations for foreclosures.
- Controls and manages relationships with sponsors, owners, management, and communities to assist in facilitating the development of Neighborhood Networks community learning centers and providing support for such tenant initiatives as crime control, clean-up days, day care availability, etc. Provides any coordination for technical assistance to resident organizations, owners, management agents, for initiating and implementing resident involvement in the management and or purchase of HUD-Owned, HUD-Held, and Insured Multifamily Housing.

KNOWLEDGE, SKILLS, AND ABILITIES

Expert knowledge of and extensive experience in commercial real estate specializing in multifamily housing including:

1. Expert knowledge of underwriting multifamily mortgage loans
2. 3-5 years supervisory experience in aggregate portfolio management.
3. Expert knowledge and experience in federal housing insurance programs, federal housing assistance programs, and other affordable housing programs.
4. Strong oral and written communication skills including a broad understanding of adapting these formats to various audience groups.
5. Ability to perform in depth financial analysis on a multifamily property.
6. Ability to direct the day-to-day work activities of a team including workload distribution and balancing to meet the needs of a rapidly changing environment.
7. Expert knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.
8. Ability to work independently in making determinations, recommendations, and investigations that involve a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs.

FACTOR LEVELS

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and experience in commercial real estate specializing in multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Knowledge of Multifamily subsidy programs i.e. Section 8, PRAC, RAP, R/S
- Aggregate portfolio management experience.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Project Manager. The Project Manager is expected to proceed independently in carrying out the assigned duties within office

and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Project Manager. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Production, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his/her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 - WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment.

DRAFT

Troubled Asset Specialist

GS-1101-13

INTRODUCTION

The incumbent of the position is located in the Multifamily Hub/Program Center and is supervised by the Supervisory Account Executive and/or Multifamily Hub/ Program Center Director. In order to fulfill the roles and responsibilities of this position, the incumbent will need extensive and detailed practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs. The incumbent will need extensive experience in managing troubled assets, risk management practices, asset workout, and claim resolution. While acting as a representative of HUD and the Multifamily Hub/Program Center, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas.

MAJOR DUTIES AND RESPONSIBILITIES

- The incumbent is considered a senior staff member who personally performs duties involving the most troubled and controversial cases and develops solutions to issues that could not be assigned to staff without expertise in managing troubled assets.
- The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- The incumbent assists the Hub Director or Supervisor in providing on the job training to other Branch employees. This includes providing information about the policies, procedures, and practices of the particular troubled multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to the Hub Director other formal and informal training needs for the effective management by risk of the Hub's entire portfolio.
- Serves as the primary point of contact for troubled projects with sponsor, customer Federal, State and local government agencies, congressional interests, other external organizations and higher authorities. Responsible for keeping the sponsor customer fully informed of project progress, on track pursuant to agreed plan of action regarding the issues and their resolution, and any impacts on costs client business standing with HUD. Assures that sponsor customer or other agencies participation in the project is in accordance with the agreed upon management plan, and facilitates the resolution of identified problems or issues in the most appropriate manner. Responsible for the development, recommendation, and oversight of all approved and required sponsor, customer and HUD agreements, leading the negotiation of such agreements on the part of the Department.

- Determines the credit acceptability and financial capacity of mortgagors, sponsors (both for-profit and not-for-profit) and general contractors involved in the purchase, refinance, or production of multifamily properties.
- Determines performance acceptability of client partners for new participants, and changes in participation.
- Determines acceptability of non-profit sponsors through an analysis of their motives, experience, and relationships, and makes recommendations concerning the acceptance of indemnity agreements whereby the mortgagors assure project completion. Makes an in-depth analysis of financial statements of sponsors and mortgagors to determine working capital and assets available for closing endorsement.
- Once a workout plan or action plan is established, measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes income, expenses, and reserve draw requests to assure changes are authorized and appropriate; Identifies unauthorized charges actions and/or charges to property operating account and assures corrective actions are taken for the ultimate disposition of inappropriate charges. Reviews project progress measuring performance and taking necessary corrective actions to maintain agreed upon schedule. Based on performance trends, forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reconciles sponsor customer client partner concerns, assuring that all participating parties are informed of project progress, issues, and impacts. Reviews and approves, within authorities provided, project cost and schedule changes. Manages project contingency funds to ensure efficient and effective utilization. Provide status reports on projects assigned (progress, issues, and trends) to the Multifamily Hub Director.
- Reviews and analyzes current and historic financial data for troubled projects; compares previous annual statements with recent financial information; analyzes current operation expenses and project financial data to form the basis of approval or denial of the following actions; rent increases, refinancing, bond refunds, prepayments, modification agreements, transfers of physical assets, changes in the corporate charter and by-laws, substitution of mortgagors, reinstatements of mortgages, budgets submitted by cooperative housing projects, and recommendations for foreclosures. Provides supporting documentation and technical arguments as part of negotiations with legal and financial professionals who act on the project owner's behalf. Review and consults with legal counsel representatives to evaluate legal documents to determine and ensure compliance with Departmental and other federal, state, and local regulations, requirements, statutes, and policies.
- Based on reviews, inspections, and analyses of various project information sources, the Troubled Asset Specialist develops solutions to facilitate maintaining the stock of affordable housing in decent, safe, sanitary and drug-free conditions. Coordinates to ensure that physical inspections are conducted as required for the purpose of evaluating physical conditions, maintenance, and security.
- Approves Action Plans and monitors progress until completion.

- Identifies projects needing on-site management reviews plans and conducts the management review, including all property operations and, all other property management practices.
- Analyzes all financial statements and project operations to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenditures of funds, adequacy of reserves, and insufficient working capital and cash flow. Initiates and follows through on any enforcement referrals.
- The incumbent will work with the Supervisor and/or Hub Director to identify a monthly watch list and work with Senior and Junior Account Executives to closely monitor watch list assets.
- The Troubled Asset Specialist will enhance and clarify the asset rating system adding necessary granularity.
- Responsible for working with sponsors, owners, management agents, and mortgagees to create workout plans for delinquent assets.
- Responsible for working in close coordination with the Property Disposition Center and the Asset Sales Division to resolve claims.
- The incumbent will work with mortgagees and mortgagors to assess the feasibility of a partial payment of claim (PPC).

FACTOR LEVELS

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.
- Knowledge and experience in federal housing insurance programs, federal housing assistance programs, and other affordable housing programs.
- Knowledge of and extensive experience in commercial real estate specializing in HUD Insured multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Aggregate portfolio management experience.
- Strong oral and written communication skills.
- Ability to work with troubled multifamily assets.
- Ability to work independently in making determinations and recommendations to the Multifamily Hub/Program Center Director to rectify physical, financial, and ownership problems that cause difficulties at multifamily properties.
- Ability to perform financial analysis on a multifamily property.
- Knowledge of industry risk management practices and ability to translate such practices to the FHA multifamily portfolio.
- Knowledge of workout arrangements with troubled mortgagors.
- Extensive experience working with servicers/lenders.

FACTOR 2 - SUPERVISORY CONTROLS

This position is under the general supervision of the Supervisory Project manager in the Program Center in the Office of Multifamily Housing management. The incumbent works collaboratively with a team leader and other vested interested parties. However, the incumbent must be able to also function independently with a minimum of supervision. Completed work is evaluated in terms of overall effectiveness in achieving program objectives.

FACTOR 3 - GUIDELINES

Guidelines used include the National Housing Act of 1937, as amended, HUD's policy initiatives, General Accounting, Office of Management and Budget and other related materials. Judgment and discretion will be used in determining, interpreting and revising existing policy, where appropriate and in accordance with outstanding rules and regulations.

FACTOR 4 – COMPLEXITY

Typical assignments require analyzing the project's overall situation in order to develop detailed plans and goals for implementing a specific Housing program, and or develop criteria for evaluating the effectiveness of the specific Housing program policies and procedures. Assignments will involve using different and unrelated processes and methods in order to improve program effectiveness. This requires assessing many issues, including pertinent regulations, a variety of documentation and selecting a course of action from various alternatives. Successful execution of the corrective action plan depends upon the ability to initiate, direct, coordinate, perform various complex and difficult tasks and a willingness to consult with Supervisory Project managers and HUB and Program Centers.

FACTOR 5 - SCOPE AND EFFECT

The work to be performed involves establishing methods and criteria for assessing the effectiveness of multifamily troubled housing program policies and procedures. The impact of the corrective action plan will involve both policy programs and contracts between the Government and the private sector. The purpose of the work is to initiate a corrective action plan that will have a visible and viable improvement to the project's problems with a permanent solution.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts will include Headquarter staff, program centers, field office staff, project owners, managers, lawyers, or other project representatives, project residents, local governments, and private industry.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining, providing, or clarifying information, gathering facts, resolving issues, coordinating and devising methods and solutions for implementing a corrective action plan for restoring the physical and financial integrity of the property.

FACTOR 8 - PHYSICAL DEMANDS

The work includes some walking, standing, bending and carrying of items such as laptop computer, files, papers and books, etc.

FACTOR 9 -WORK ENVIRONMENT

Work is usually performed in an office setting but requires some travel to actual project sites.

DRAFT

OFFICE OF MULTIFAMILY HOUSING FRONT OFFICE

Budget, Legislation, and Policy Office

Administrative Specialist (GS-0301-11)

GS-0301-11

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary of Multifamily Housing's Front Office. The incumbent of this position is responsible for providing a wide-range of administrative support to the Policy Office Director and staff responsible for providing advice of a sensitive and confidential nature on a wide range of bills, statutes, regulations and policies pertaining to programs in the Office of Multifamily Housing.

As Administrative Specialist, the incumbent provides extensive administrative support to the Policy Office and for control and management of all documents, particularly coordinating comments on clearances and cross-cutting material sent to the Office for comment. This position reports directly to the Policy Office Director.

Specific duties and responsibilities focus on providing extensive office administrative support in the workload control area involving a wide-range of complex staff assignments and or issues. The incumbent applies an extensive knowledge of office administration and subject-matter expertise required to support the Policy Office. General guidance and instruction are provided by the Policy Office Director, but the incumbent is expected to exercise independent judgment and provide technical assistance in performing and executing most duties. Operating under delegated authority, the incumbent makes recommendations for the resolution of difficult or complex problems that are essential to the effectiveness and efficiency of operations of the Office. The incumbent also establishes administrative goals and objectives to promote efficiency and productivity and fulfill mission requirements. In most instances, recommendations made by the incumbent are accepted by the Policy Office Director.

MAJOR DUTIES AND RESPONSIBILITIES

- Maintains a current knowledge of Multifamily policies and ongoing projects. Independently furnishes accurate and completed the information on established policies and procedures, status of office projects, and planned activities in a timely manner. The position requires a close working relationship with the Policy Office Director and other senior staff members.
- Independently performs a variety of special assignments that require a working knowledge of the office's organizational, administrative and functional responsibilities, the ability to do research; and established contacts with other offices, both inside and outside the Department.

- Greets visitors. Serves as the gatekeeper, controlling, and directing visitors and callers to appropriate staff within the Policy Office.
- Responds to routine and non-technical request for information, such as status of reports, suspense dates, and similar information readily available from files. This may involve determining whether or not to release the information based upon the nature or degree of sensitivity of the information and the requestor's authority to receive the information.
- Serves as records management liaison, ensuring that records are archived in accordance with HUD policy. Using computer software programs, prepares a variety of formatted documents (correspondence, reports, and information documents) in final form, including exhibits, tables, spreadsheets, organizational charts, and statistical reports. This includes thoroughly proofreading documents and ensuring proper grammar, spelling, capitalization, punctuation, use of acronyms, and format are used, and that requested information is included or attached, and that the package is assembled according to office procedures.
- Drafts office responses to routine correspondence for the Policy Office in response to general requests of a recurring nature.
- Establishes internal suspense dates, assembles and distributes all pertinent information, including, but not limited to, previous communication or background information related to current correspondence.
- Establishes and maintains correspondence files.
- Provides guidance to clerical staff in Administration on correspondence requirements and changes.
- Monitors office and Departmental correspondence tracking systems and alerts appropriate staff of deadlines. Prepares correspondence and policy status reports. Develops, establishes and maintains databases and or logs to track controlled correspondence.
- Ensures that information requested is provided in compliance with Departmental correspondence policies. Reviews for format, package assembly, and grammatical accuracy. Initiates follow-up action to ensure timely processing of correspondence. Maintains correspondence files. Analyzes correspondence or policy issuances to ensure completeness, correct format, grammar, spelling and consistency with Departmental regulations, procedures and preferences. On own initiative returns such documents to originator, ensuring corrections are made.
- Performs other related administrative duties and functions as appropriate.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Thorough knowledge and understanding of administrative regulations, policies and practices sufficient to independently perform duties as an assistant to the Policy Office Director and to provide extensive staff support and assistance to assigned office personnel.

- Knowledge of substantive issues and functions of the office as they relate to the overall mission of the organization.
- Knowledge of the organization, programs, assigned responsibilities, priorities, commitments, policies and program goals of the Office of Multifamily Housing sufficient to make judgments on non-routine, unique correspondence.
- Knowledge of pertinent laws, regulations, policies and precedents, which affect the use of program and related support resources in the area studied. Has knowledge of the major issues, program goals and objectives, work processes, and administrative operations of the organization. --Knowledge of, and ability to apply that knowledge, to the substantive programs, activities, and policies of the Department as they relate to Office of Multifamily Housing programs and functions, and as they relate to other offices, agencies, and organizations in the public and private sector
- Ability to identify, understand and interpret relevant positions on program office considerations, as they effect the development of organizational policies and procedures to be used throughout the organization.
- Skill in oral and written communication which enables the incumbent to advise and instruct staff members on staff actions, reports, tasks, office correspondence, and the use of automated office equipment.
- Skill in anticipating and adapting administrative procedures to meet office demands and requirements.

FACTOR 2 - SUPERVISORY CONTROLS

Under the general guidance of the Policy Office Director, the incumbent serves as Administrative Assistant with responsibility for planning and carrying out the work of the office while resolving difficult or unique problems in accordance with evolving guidelines, procedures, policies, and practices. Completed work is evaluated for adequacy, appropriateness and effectiveness in support of the Office mission.

FACTOR 3 - GUIDELINES

Guidelines are in the form of agency policy statements or broad precedents, and are applicable in establishing general program direction but not sufficient for dealing with more complex, sensitive, or unusual situations or problems encountered on a recurring basis. The incumbent must exercise considerable judgment in interpreting and adapting existing precedents to develop new approaches or solutions to problems.

FACTOR 4 - COMPLEXITY

Works involves participation in planning, implementing, coordinating, and evaluating ongoing project activities of the organization. In this regard, work is highly complex and sensitive, involves frequent changes in conditions governing program operations, and requires extensive consultation and coordination with senior level Department officials. Decisions regarding what needs to be done require an analysis of the factors affecting the particular situation, and determining the most effective methods and techniques to use to achieve the desired results.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to plan, manage, and effectively coordinate the issues associated with Office programs. The incumbent must use sound judgment in resolving critical problems and be responsive and persuasive in coordinating these activities. The work products and services affect a wide range of organization responsibilities, and contribute to the overall effective management of the organization. Factor 6 7 - Personal

FACTOR 6 - CONTACTS AND PURPOSE OF CONTACTS

Personal contacts are with the highest-level officials in the Department and their immediate staff, with officials of other government agencies, and high-level private sector officials. Contacts are moderately unstructured and not routinely established, the purpose of each contact is different, and the role and authority of each party is identified and developed during the contact.

Contacts are to advise others of the Policy Office's views or commitments. To analyze, evaluate, communicate information, and develop recommendations to senior agency officials, to reconcile conflicting points of view, obtain clearances, coordinate overall work effort, and solve mutual problems

DRAFT

Administrative Specialist (GS-0301-13)

GS-0301-13

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary of Multifamily Housing's Front Office. The incumbent of this position is responsible for providing a wide-range of administrative support to the Policy Office Director and staff responsible for providing advice of a sensitive and confidential nature on a wide range of bills, statutes, regulations and policies pertaining to programs in the Office of Multifamily Housing.

As Administrative Specialist, the incumbent provides extensive administrative support to the Policy Office and for control and management of all documents, particularly coordinating comments on clearances and cross-cutting material sent to the Office for comment. This position reports directly to the Policy Office Director.

Specific duties and responsibilities focus on providing extensive office administrative support in the workload control area involving a wide-range of complex staff assignments and or issues. The incumbent applies an extensive knowledge of office administration and subject-matter expertise required to support the Policy Office. General guidance and instruction are provided by the Policy Office Director, but the incumbent is expected to exercise independent judgment and provide technical assistance in performing and executing most duties. Operating under delegated authority, the incumbent makes recommendations for the resolution of difficult or complex problems that are essential to the effectiveness and efficiency of operations of the Office. The incumbent also establishes administrative goals and objectives to promote efficiency and productivity and fulfill mission requirements. In most instances, recommendations made by the incumbent are accepted by the Policy Office Director.

MAJOR DUTIES AND RESPONSIBILITIES

- Develops and implements administrative plans and procedures affecting the operations of the Office.
- Develops and maintains sound organizational structures, improves management methods, and monitors the effective use of resources.
- Formulates, executes, and administers the annual operating budget.
- Recommends, develops, and justifies, both verbally and in writing, budget estimates and support documentation for all operating budget needs, staffing needs and Congressional justifications.
- Serves as principal liaison with the Administration Comptroller.
- Recommends and prepares all necessary budget modifications.
- Ensures accurate and timely HUDCAPS FFS entries are completed.
- Monitors personnel management matters throughout the organization.
- Provides advice to management on methods to improve human relations, communication, and motivation. Works to identify and analyze underlying forces and practices, which may cause human relations issues and recommends solutions.

- Maintains expert knowledge of policies, regulations, and procedures in the administrative management areas.
- Reviews proposed amendments to policies, regulations, and procedures and evaluates the impact of changes on the administrative functions of the Office.
- Ensures that the administrative activities are handled efficiently and effectively and with consistency throughout the organization. These activities include procurement of goods and services; payment of invoices for goods and services received; travel; training; all areas of personnel administration to include employee and labor relations, payroll processing and performance management; performance and incentive awards; space management; records forms issuances management; safety and health; and management of special emphasis programs.
- Facilitates the development of the Annual Procurement Plan in consultation with appropriate management officials.
- Provides advice and assistance to staff and management in these and other administrative matters.
- Attends meetings with operations officials of HUD, representatives of the private sector and other Federal agencies on matters relating to administrative management.
- Performs other duties as assigned

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the organization's structure and mission and the functions of its various offices.
- Expert knowledge of policies, regulations and procedures in administrative areas.
- Expert knowledge of regulations, procedures and practices enable the incumbent to provide advice and guidance on policy issues; review matters for compliance with regulations and procedures; design monitoring and tracking systems; and establish records for maintaining historical data.
- Knowledge and ability to develop and maintain sound organizational structures, improves management methods, and monitor the effective use of resources.
- Knowledge and ability to formulate, execute, and administer the annual operating budget.
- Ability to develop, recommend, and justify budget estimates and support documentation for all operating budget needs, staffing needs and Congressional justifications.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides broad administrative direction with assignments in terms of mission requirements. The employee has responsibility for independently planning, designing, and carrying out programs, projects, studies, or other work. Results of the work are considered as technically authoritative. Review is limited to the fulfillment of program objectives in

supporting the organization's missions, goals and priorities. Work is reviewed only for conformance with general objectives and overall results achieved. The incumbent is expected to use mature judgment and discretion in carrying out responsibilities.

FACTOR 3 - GUIDELINES

Guidelines are general Departmental and Office policy, legislation, Federal regulations, and broadly stated technical objectives. These broadly stated, general guidelines require interpretation for application to specific issues, cases. The incumbent uses judgment in selecting the appropriate procedures or references for the assignment. Situations where significant deviations are required require the incumbent to formulate techniques to accommodate the issue. The work requires the development of procedural guides to supplement higher-level issuances.

FACTOR 4 - COMPLEXITY

Assignments are diverse in nature and cover a number of administrative management programs or projects for which a variety of different planning, coordinating, negotiating, and advisory functions are required to ensure the efficient operations. Decisions regarding what needs to be done include the exercise of experienced judgment in adapting techniques to resolve unique problems.

FACTOR 5 - SCOPE AND EFFECT

The incumbent affects the effective and efficient utilization of resources and avoiding fraud, waste and mismanagement issues. The incumbent provides services to employees and management throughout the Office in a variety of administrative management areas. The purpose of the work is to coordinate and monitor the administrative management activities, and recommend or initiate corrective actions as required. The work involves establishing criteria; formulating projects; assessing program effectiveness; and investigating or analyzing a variety of unusual conditions, problems, or questions. The incumbent serves as a principal expert on a variety of administrative management activities.

FACTOR 6 AND 7 - PERSONAL CONTACT PURPOSE OF CONTACTS

Works closely with managers and employees at all levels within the Office and other HUD offices to accomplish the goals of the Office. Works with Union officials and experts in all areas of administrative management activities. Contacts include experts and managers in the private sector and other Federal departments and agencies. Works with employees and management throughout the Office to explain procedures or to counsel on administrative management activities. The purpose of the contacts are to explain procedures actions to employees and management, to explain management positions to Union officials, and to influence and motivate employees and managers to follow established policies and procedures or accept recommendations.

FACTOR 8 - PHYSICAL DEMANDS FL 8-1

The work is sedentary.

FACTOR 9 - WORK ENVIRONMENT FL 9-1

The work is performed in a typical office setting.

DRAFT

Budget Analyst

GS-0560-14

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary of Multifamily Housing's Front Office. As a senior budget analyst, the incumbent plans, organizes, and carries out a major, substantive budget for a significant program component, ensuring the effective integration of program and budget planning.

MAJOR DUTIES AND RESPONSIBILITIES

- Performs a wide variety of administrative and analytical duties connected with the review, justification and presentation of the budgets for a program office or major component(s) of a program office.
- Provides advice to top management on the Federal budget process. May develop, recommend, and implement budgetary policies affecting the financing and accomplishment of national programs.
- Provides long-range analysis of the potential effects of budgetary actions on national economic, social, and political objectives.
- Provides authoritative interpretations of Congressional legislation and OMB policies and precedents. Reviews, approves, disapproves, and recommends the amount and timing of allotments of funds to agency components and programs.
- Develops proposed appropriation language in support of new or revised program and budgetary requirements.
- Tracks progress of program office appropriations through Congress.
- Justifies budget before OMB staff.
- Provides liaison between OMB staff and program office budget offices.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the Department and the Federal budget process, and all associated policies, directives, procedures and regulations, to develop and provide authoritative advice and interpretations of legislation and policies and precedents.
- Knowledge of organization's mission, programs, and legislative history to develop budgetary policies, to assist line organization in setting and implementing program goals, to determine how they impact and interact with other programs and budgets of the Department, and other Federal and state agencies.
- A high degree of skill in analysis and comparison of program content, cost-benefit, and political viability of alternative budget and program actions.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides broad administrative and policy direction through discussion of financial and program goals and related Presidential, Congressional, or political considerations

that affect agency budgets. The incumbent independently plans, schedules, coordinates, implements, and evaluates the effectiveness of budgetary programs in the assigned organization. The supervisor without substantive change accepts technical and policy judgments concerning agency budgets. Review of the incumbent's decisions and recommendations are primarily for the purpose of evaluating their impact on Department-wide goals, objectives, and priorities.

FACTOR 3 - GUIDELINES

The incumbent is a recognized technical authority on the development and interpretation of budgetary guidelines, policies, legislation, and regulations covering the budgetary operations of one-or-more substantive national programs. Guidelines are nonspecific and stated in terms of broad policies and goals such as appropriations language, enabling legislation, precedent-setting judicial decisions, and broad based Comptroller General decisions. The incumbent must use initiative, judgment, and originality researching and interpreting national policies and legislation, in developing broad agency budgetary programs and or regulations and policy, in determining when new or revised legislation is needed, and in researching and preparing recommendations for the content of such legislation.

FACTOR 4 - COMPLEXITY

Assignments at this level are varied and complex and require in-depth analysis to determine the means of resolution and the application of a variety of non-related techniques and methods to a broad range of budget tasks. Work involves reviewing, analyzing, consolidating, and revising budget estimates, justification statements, and budget execution plans submitted by organizations. The incumbent advises managers on appropriate budgetary action to be taken to meet agency needs, makes recommendations affecting substantive programs, monitors and reports on the rate of expenditure of funds, and alerts managers of trends in obligation of funds. Decisions made are affected by conflicting and changing influences. The work involves consideration of such issues as: financial and workload relationships; timing of obligations and expenditures in relation to the budget cycle; current and future resource needs; direct or indirect monetary impact of new legislation. The incumbent is responsible for performing associated budget work for programs and or organizations with substantive programs with varying needs, goals, objectives, work processes, and timetables.

FACTOR 5 - SCOPE AND EFFECT

The primary purpose of the work is to review, analyze, monitor, and resolve budgetary problems in all program and budgetary aspects of assigned program area to assure compliance with Secretarial priorities, and OMB and Congressional guidelines. Advice, information, and recommendations made by the incumbent concerning the budget are used to form the basis for Secretarial decisions regarding the program content, resource level, and format of the agency budget requests to OMB and Congress.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with program managers, top officials of the organization, and such individuals from outside the organization who represent the budget and program interests of other

Federal agencies, contractors, and private business. Contacts normally take place at formal budget briefings, or negotiations.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are made to resolve budgetary issues and problems, to prepare budget requests and supporting documentation, and to provide information to officials within and outside the Department. Contacts are to advise officials of the current status of agency programs, and to persuade them to approve recommended funding requests, budgetary actions, and estimates. Actively participates in OMB and Congressional reviews of the budget on behalf of the Department's program and budgetary policies.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary.

FACTOR 9 - WORK ENVIRONMENT

The work is normally performed in an office setting.

DRAFT

Director, Policy Office

GS-0343-15

INTRODUCTION

The Director of the Office of Policy reports to the Deputy Assistant Secretary (DAS) for Multifamily Housing Programs, and is responsible for providing advice and assistance to the DAS on overall policy, legislation, program development and evaluation. This includes: research and demonstration programs with respect to the Department's Multifamily housing programs; representing the DAS with the Office of General Counsel in recommending Multifamily housing legislative proposals; coordinating and expediting Multifamily program regulations with the Office of the Assistant Secretary for Policy Development and Research on research initiatives and long-range policy issues; for coordination with officials of other Federal agencies in relation to legislation and regulatory proposals which relate to both their activities and Multifamily programs; and for providing analytical services and preparing analytical reports.

In addition to directing the basic program planning and evaluation activities of the Office of Multifamily Housing, the incumbent is responsible for resolving differences between program Office Directors on program policy issues. Provides the DAS with recommendations regarding policy requirements which have an impact both on key groups such as the Congress and Multifamily housing-related public interest groups, and on the full range of major decisions affecting the basic content and character of the operation of Multifamily programs. He she articulates and defends the Department's goals, objectives and strategies to the general public, Congressional staff, program recipients, and interest groups.

MAJOR DUTIES AND RESPONSIBILITIES

- Oversees the development and implementation of major policy, program and legislative initiatives, impacting the full range of multifamily housing programs.
- Oversees the analysis of various program and policy options and develops, plans and carries out special studies and analysis regarding high level policy issues; program and funding options; strategic alternatives; cost-benefit assessments; impact assessments; alternative financial or management strategies; or other major concerns related to Multifamily policies, programs or legislation.
- Provides advice and technical insight to the DAS and other senior Department officials regarding the development of new policies, programs or legislation including providing historical perspective on existing policies, programs, and enabling legislation and providing insight on issues and problems stemming from existing or former programs, policies or legislation.
- Directs the development and coordination of legislative proposals for the DAS to consolidate or amend the Department's Multifamily housing programs or to create new programs, based on demonstrated needs and new directions in Departmental policy Coordinates implementation of legislative and administrative initiatives throughout Multifamily, ensuring that the intent of Congress and the Department are followed as

well as ensuring that Congressional and agency deadlines are met and that program purposes are advanced to the maximum extent possible.

- Directs the review and analysis of new or proposed Multifamily housing program policies based on the Department's overall housing objectives and the impact of such policies on current overall housing policy.
- Directs the development of program designs to implement new programs and policies authorized by Congress for which organizational responsibility has not been assigned.
- Directs the review and analysis of legislative proposals based on the Department's overall housing objectives, Multifamily housing program needs, and the impact of such legislation on existing Multifamily legislation.
- Directs and or assists in the preparation of testimony and briefing materials for appearances of Office of Multifamily Housing officials before Congressional committees, and the preparation of explanatory materials for use by Congressional committees in relation to proposed public legislation.
- Coordinates with officials of other Federal Departments in relation to legislation and regulatory proposals relating to both their activities and Multifamily housing programs.
- Directs the origination, in coordination with the program offices involved, of regulations, notices and guidelines; the tracking and expediting, in coordination with the appropriate Multifamily Offices, of the priority regulations, notices and guidelines of the DAS; and coordination with the Office of General Counsel to ensure the expeditious and effective development of regulations, notices and guidelines.
- Directs coordination with and assistance to the Office of the Assistant Secretary for Policy Development and Research regarding studies of the effectiveness of multifamily programs.
- Directs the formulation of recommendations concerning research programs, the development of research programs in coordination with the Office of Policy Development Research, and negotiations with the Office of Policy Development and Research regarding funding and implementation.
- Directs coordination of the monitoring of research contracts and the monitoring of the results of such research, with the Office of Policy, Development and Research, and directs the making of appropriate policy and program recommendations.
- Directs the preparation of policy proposals based on the results of research into multifamily housing programs.
- Directs the shaping of recommendations to the DAS regarding the use of technical assistance and other available measures to improve implementation of key Multifamily initiatives, and assists in the implementation of such measures as called upon.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

- Work products are essential to the operation of the Multifamily Housing programs and are used nationally by HUD offices and program participants. The incumbent works in an

environment having maximum potential impact on persons served by Multifamily Housing programs and effect on the major policy directions of the Department.

- The incumbent's assignments deal with providing advice or setting standards on important issues that are sensitive, have considerable financial implications, and cross program and Departmental lines. The positions taken have a substantial influence on the policy direction of Multifamily Housing programs and on the policy direction of Multifamily Housing programs of other Departments, the decisions having nationwide impact.
- The work involves supervising the preparation of legislative proposals to improve, consolidate, or create multifamily housing programs and initiatives; and in the implementation of legislation impacting the full range of multifamily housing programs, through regulations, guidance, and administrative actions. This requires the application of comprehensive knowledge of Multifamily Housing programs and statutory authorities.
- The incumbent also plans, organizes and directs innovative program demonstrations and evaluations to determine program impact. Analyzes, discusses, and writes authoritatively on a variety of complex issues crossing program and Departmental lines and which require an understanding and careful balancing of conflicting interests. Negotiates and favorably resolves matters which may be sensitive and have important legal and fiscal implications (the topics handled are often without precedent and require independent research, in-depth study, and novel solutions).
- This position requires expert knowledge and application of all pertinent Federal statutes, HUD regulations, pertinent handbooks, guidelines, and policy determinations and a working knowledge of the operations of government, both the Executive Branch and Congress. The position also requires a mastery of comprehensive issues related to Multifamily Housing.

FACTOR 2 - ORGANIZATION SETTING

The incumbent is under the general supervision of the DAS for Multifamily Housing, who provides overall and general direction with assignments in terms of Office of Multifamily Housing mission requirements. Review of incumbent's work covers such matters as fulfillment of program objectives and effect of advice and influence on the overall programs. The incumbent represents the Department, including the DAS, on highly sensitive and controversial issues in meetings and negotiations held with Multifamily and other Departmental program offices, national and regional organizations, Congress, resident groups, mayors and representatives of other Departments and agencies, as well as the general public.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

Directs, plans, oversees and coordinates Office operations as reviewing-level supervisor. Allocates, controls and ensures efficient use of Office resources, i.e., funds, personnel, property, etc. Reviews and evaluates operations to make work assignments; assesses and enhances program and policy efficiency and effectiveness; makes, coordinates and or recommends improvements. Interviews candidates and makes selections for supervisory, non-supervisory and team leader positions. Develops performance standards; evaluates immediate

subordinate and supervisory work performance; serves as reviewing official for performance evaluations completed on non-supervisory employees; and assures equity among subordinate performance standards and rating techniques developed. Resolves serious work related problems or complaints; makes reviews approves serious disciplinary actions proposed. Makes decisions on work problems and on training costs that are costly, non-routine, or controversial. Approves within-grade increases, extensive overtime, and travel expenses. Recommends personnel awards bonuses and changes in personnel management actions, subject to review and or final approval by higher-level officials.

FACTOR 4 - PERSONAL CONTACTS: NATURE OF CONTACTS

Frequent interactions and personal contacts are with senior officials inside and outside the Department, including housing officials and staff of national public interest groups and Congress. Contacts are made frequently on a wide range of topics and occur at conferences, briefings and meetings in Headquarters and in different locations throughout

DRAFT

Management Analyst (Directors)

GS-0343-13

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary of Multifamily Housing's Front Office. Key responsibilities include developing, recommending, coordinating, and administering directives, forms, regulations, delegations of authority related to Office of Multifamily Housing programs and conducting management surveys and analyses relative to systematic improvement of administrative management.

MAJOR DUTIES AND RESPONSIBILITIES

- Serves as Management Analyst with primary responsibility for the analysis of directives, encompassing Multifamily Housing programs and functions, the analysis of directives proposed by Multifamily offices and other program Assistant Secretaries, delegations of authority, regulations, reports, forms, management surveys, and analyses relating to the improvement of administrative management.
- Tracks and analyzes public information collection data for all Multifamily Housing programs for review and approval by the Office of Management and Budget (OMB). Recommends consolidation or cancellation of reporting information for Multifamily clients and program Office Directors.
- Prepares the Annual OMB Information Collection Budget. As Multifamily's liaison with the Office of the Chief Information Officer (CIO), provides information and oversight for automation of information collection to implement the Government Paperwork Elimination Act Plan.
- Serves as the Office of Multifamily Housing Directives Management Officer, Reports Liaison Officer, and Forms Management Officer. Independently plans, organizes, reviews, and analyzes work assignments received from Multifamily's program offices. Assignments include new or revised regulations, directives, forms, reports, etc., proposed by program offices related to Federal and HUD policies and procedures. Incumbent's views and analyses are made to determine required clearance points, conflicts in organizational, functional, policy or procedural aspects, and to assure clear and correct relationships between the Office of Multifamily Housing and its program participants. Provides technical assistance and advice to Multifamily program offices in the development and design of forms.
- Analyzes directives from the standpoint of clarity and probable technical effectiveness, and makes recommendation to initiation program offices for improvements in these aspects, where necessary.
- Ensures that adequate clearance has been obtaining for proposed issuances, both within Multifamily and with other primary organizational units. In this connection, consideration must also be given to issuances which may require the Secretary's approval of Federal Register publication. Duties require a detailed knowledge of HUD organization and the placement of functions and responsibilities within the

organization. The incumbent advises initiating offices in cases where additional clearance is required and ensures that comments of all clearances offices have been adequately considered. When conflicts arise, assists in reconciling differing viewpoints.

- Maintains direct contact and liaison with officials in the Office of General Counsel to resolve policy and procedural problems, to establish and meet target dates for publishing program information and requirements in the Federal Register, and to expedite preparation and release of major policies and procedures of the Deputy Assistant Secretary for Multifamily Housing.
- Analyzes and coordinates comments on new policies, procedures, systems and legislation which cut across several major HUD organizational entities or which apply Department-wide. Analyzes and comments for Multifamily on drafts of policies and procedures initiated in primary organization entities, other than Multifamily, as they relate to varied areas of public and assisted housing.
- Converses with evolving program concepts and objectives of Multifamily and with the requirements of those directives which need review by program offices, field staff, policy legislative staff, etc., and for those which must be sent for clearance under provisions of various office of Management and Budget Circulars.
- Under the direction of the Policy Office Director, conducts all types of management surveys, studies and analyses relating to improvement of administrative management. Such assignments may be of a non-recurrent type that must be designed to meet the specific needs of given situations.
- Studies assigned may relate to the complexities of changes in legislation and may result in recommendations for shifting workload and program emphasis, realignment of organizational units or program functions. Recommendations required may relate to the proper distribution of responsibility for functions among a number of organization units, improved coordination, elimination of duplication, changes in delegations of authority, staffing, etc.
- In leading or participating in studies, incumbent consults with appropriate officials, reviews legislation and Congressional hearings, regulations of other Government agencies, procedures, contracts, etc. Analyses findings, formulates conclusions, and makes appropriate recommendations in a report. Incumbent may be assigned to participate in assisting the affected organizational units in implementing the recommendations.
- Serves on special Departmental committees tasked with making special studies relating to issuance matters and system.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION LEVEL: 1-8

Duties require the application of a broad knowledge of all Departmental programs and other Federal Agency programs (including rules and regulations) relating to or affecting Multifamily programs, policies and procedures and an in-depth knowledge of all Multifamily programs and responsibilities in order to provide the analysis to technical matters required.

This position also requires the ability to conduct assessments and make recommendations based on existing program regulations and procedures, and based on available program data; the ability to quickly analyze, discuss, and write authoritatively on a variety of complex issues crossing program and Departmental lines and requiring an understanding and careful balancing of conflicting interests; and the ability to negotiate and favorably resolve matters which may be sensitive and have important legal and fiscal implications.

FACTOR 2 - SUPERVISORY CONTROLS *LEVEL: 2-4*

The supervisor provides overall and general direction with assignments in terms of public housing mission requirements. The incumbent:

- Works with the supervisor in developing goals, tasks, and deadlines;
- Often takes the initiative in identifying and assuming responsibility for major assignments;
- Coordinates efforts with other concerned parties both within and outside HUD, usually resolving differences without assistance;
- Represents Multifamily with external organizations and individuals, and independently handles difficult tasks requiring considerable skill and judgment;
- Maintains workflow with minimal involvement of the supervisor; and
- Completed assignments projects typically can be sent from the Office without review. Tasks involving complex issues with significant policy implications are reviewed for effectiveness in carrying out program and Departmental objectives.

FACTOR 3 – GUIDELINES *LEVEL: 3-4*

Incumbent insures that proposed issuances conform to basic HUD policy, are not in conflict with other existing issuances (either Departmental or Multifamily), reflect the correct relationship between local and Federal responsibilities; implement HUD organizational patterns as they are announced, and cover all related Federal and HUD regulations involving equal opportunity in housing and employments, wage rates, relocation, decentralization of authority, local body and internal HUD reporting, etc. Incumbent's findings and recommendations as a result of such analysis are accepted as completed staff work.

In some instances, existing principles must be modified or expanded to deal with changing circumstances. In some instances, there are few or no guidelines, and standards must be created.

The incumbent must also develop new approaches to address important issues as they arise, foreseeing and avoiding potential problems. Policies and recommendations must be legally correct and promote the Department's goals.

FACTOR 4 – COMPLEXITY *LEVEL: 4-5*

One facet of this position relates to the issuances for both local program participants and HUD Headquarters Field staff in carrying out all Multifamily program responsibilities and for

coordinating Multifamily input into policies, procedures and programs of the other Assistant Secretaries of the Department.

Assignment and issues handled are extremely diverse and numerous, covering any and all Multifamily programs. They are multifaceted and unusually difficult, frequently involving the interaction of programs which were designed as separate entities and do not easily mesh. The issues often involve situations which are at the forefront of public attention; at other times, they are obscure matters whose early resolution can prevent them from becoming wider concerns.

FACTOR 5 - SCOPE AND EFFECT LEVEL: 5-5

Work products are essential to the operation of the Multifamily programs and are used nationally by HUD

Field staff and program participants. The incumbent works in an environment having maximum potential impact on persons served by Multifamily programs and effect on major policy decisions of the Department.

Studies assigned may relate to the complexities of changes in legislation and may result in recommendations for shifting workload and program emphasis, realignment of organizational unit or program functions. Recommendations required may relate to the proper distribution of responsibility for functions among a number of organizational unit, improved coordination, elimination of duplication, changes in delegations of authority, staffing, etc.

The incumbent's assignments deal with providing advice or recommendations on setting standards on important issues that are legally sensitive, have considerable financial implications, and cross program and Departmental lines. The positions taken a substantial influence on the policy direction of Multifamily programs and on the programs of other Departments, the decisions having nationwide impact.

FACTOR 6 - PERSONAL CONTACTS LEVEL: 6-3

Personal contacts are with senior official inside and outside the Department. Contacts are made frequently on a wide range of topics by telephone, through meeting and conferences. Meeting and conferences take place

Program Analyst, Policy Office

GS-0343-11

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary of Multifamily Housing's Front Office. The incumbent of this position serves as a program analyst, responsible for functions relating to the review and analysis of multifamily housing programs and policies and the development of basic plans, policies and legislative proposals. The incumbent is responsible for being sufficiently knowledgeable about all of the policy issues concerning multifamily housing to perform assignments concerning them competently. At any point in time, the incumbent is also a staff expert on policy issue areas of major concern to the Deputy Assistant Secretary. Generally, the incumbent is responsible for performing assignments of moderate complexity in the issue areas for which he she is assigned special responsibility.

In carrying out his her other assignments, the incumbent has latitude to interact and negotiate with staff in other offices at the Deputy Assistant Secretary level or lower. He she serves as a Multifamily representative on any inter-HUD or inter-agency task force groups consisting of staff at these levels.

MAJOR DUTIES AND RESPONSIBILITIES

- Analyzes programs and policy options and develops options papers and policy proposals, particularly with regard to economic;
- Analyzes new or proposed program policies and their impact on current overall Multifamily housing policies;
- Develops program designs to implement new programs and policies authorized by Congress for which organizational responsibility has not been assigned;
- Develops legislative proposals and coordinates development of legislative proposals by program offices;
- Reviews and analyzes legislative proposals and their impact on existing programs;
- Prepares testimony for appearances of program officials before Congressional committees; prepares briefing materials for these officials and explanatory materials for use by Congressional committees in relation to proposed legislation;
- Develops proposals concerning regulations for the use of the Office of General Counsel in issue areas for which the incumbent has special responsibility; tracks and expedites the development of regulations elsewhere in the Office of Multifamily Housing;
- Coordinates with and assists the Office of Policy Development and Research in program effectiveness evaluations;
- In coordination with the Office of Policy Development and Research, recommends and develops research programs in issue areas for which the incumbent is assigned special responsibility; negotiates with this office regarding funding and implementation of these proposals;

- In coordination with the Office of Policy Development and Research, monitors research contracts in the areas for which the incumbent is assigned special responsibility and the results of such research;
- In coordination with the Office of Policy Development and Research, prepares policy proposals that are based on the results of research; and
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge and skill in applying the basic principles, practices, and methods of program analysis to determine whether policies and program designs are in conformance with Congressional intent and overall Administration policy
- Knowledge of legislative, regulatory and policy issues concerning Multifamily Housing and their relation to overall housing policies in order to develop policy options and proposals.
- Knowledge of organization, programs, missions, and functions of the Office of Multifamily Housing in order to evaluate and recommend ways to improve the organization's effectiveness and efficiency.
- Knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness and efficiency of Multifamily Housing programs.
- Knowledge of automated systems and their application to the program analysis field and program analysis ability to analyze quantitative data and prepare technical reports, analyses and guidance. -Skill in preparing policy papers and staff reports and skill in delivering briefings to managers to encourage acceptance of findings and recommendations in complex technical areas.
- Skill in interpreting and applying complex legislative, policy and regulatory decisions to develop policies and guidance.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides limited direction, setting the overall project objectives. The supervisor, in consultation with the incumbent, develops deadlines and project plans. The incumbent is responsible for independently performing assignments and keeping the supervisor apprised of potentially controversial issues. Completed work is reviewed for effectiveness in meeting organizational goals and overall feasibility.

FACTOR 3 - GUIDELINES

Guidelines consist of standard Federal regulations and organizational directives. Procedural guidelines are not always applicable to specific project assignments; therefore, the incumbent must use judgment in selecting or adapting guides.

FACTOR 4 - COMPLEXITY

The incumbent is assigned projects that require gathering information, identifying and analyzing issues, and developing recommendations to resolve substantive problems of program effectiveness and efficiency. Studies often require qualitative and quantitative analytical techniques, which frequently require adjustments to fit a wider range of variables (e.g., socio-economic consequences and impact on long-range organizational goals and objectives). In some instances, the incumbent must develop data, which is currently unavailable about program effectiveness or efficiency, and the impact of policies on public and Indian housing constituent groups.

The incumbent prepares and advises managers on the preparation of detailed policy options and legislative proposals for various multifamily housing programs. Work involves the consideration of legal and regulatory constraints, budgetary constraints, and alternative means of accomplishing policy and program objectives. Work frequently involves making decisions and recommendations concerning complex policy options under conditions of high uncertainty and time pressure.

FACTOR 5 - SCOPE AND EFFECT

The work involves studies of administrative and managerial processes and procedures to assess productivity, effectiveness, and efficiency of program operations. The studies may involve one or several organizations and may affect the administrative methods of the organization, managerial processes, or the operating unit within the organization. The incumbent analyzes results and makes recommendations regarding studies of work processes and procedures. The incumbent applies the fundamental principles, practices, and procedures of program analysis to assess the effectiveness and efficiency of public and Indian housing programs and to recommend policy and or legislative changes to enhance program performance. The tasks performed constitute a segment of the broader and more complex assignments of higher-graded co-workers within the Office. The incumbent provides advice and guidance to program staff on issues of program effectiveness and efficiency, Congressional intent and overall Administration policy. Work completed affects the plans, goals and effectiveness of public and Indian housing programs at all levels of program implementation.

FACTORS 6 AND 7 PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts are with employees, supervisors, and managers throughout the organization. Some contacts are with consultants, contractors or managers at the agency level. Contacts are for the purpose of gathering information to facilitate studies being conducted or exchanging information and discussing issues and options available. There may be some degree of controversy involved in the process of influencing others to accept ideas.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, requiring no special physical demands.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a typical office setting.

Senior Program Analyst

GS-0343-15

INTRODUCTION

This position is located in the Policy Office within the Deputy Assistant Secretary (DAS) for Multifamily Housing's Front Office. The incumbent of this position serves as a senior program analyst, responsible for the most important functions relating to the review and analysis of Multifamily Housing programs and policies and the development of basis plans, policies and legislative proposals. This position is established to analyze, evaluate and advise management on the effectiveness of Multifamily programs and policies and or the efficiency of the management of operating programs.

MAJOR DUTIES AND RESPONSIBILITIES

As a senior analyst of the office, the incumbent is responsible for being sufficiently expert in all of the policy issues of major concern to the DAS to handle assignments of the utmost complexity and prepare top quality work products in any of these issue areas. As a senior analyst, the incumbent is also particularly responsible for those policy issues having the highest importance in the sense they involve all of the Multifamily housing programs and cut across or strongly influence a number of Federal agencies and or departments.

When assigned by the Policy Director, the incumbent can work directly with other policy officials in the Office of Multifamily Housing, the rest of HUD and other Federal departments and agencies, in order to resolve policy issues of exceptional importance. Serves on the highest-level Multifamily Housing, HUD and inter-agency task groups in which staff below the senior executive level can participate. These inter-agency task groups often concern issues that impact substantially on a number of departments and or agencies. At the request of the Policy Director, represents the Office of Multifamily Housing at meetings with State and local public housing officials and leadership of industry groups. Many of these meetings concern sensitive, controversial and extremely complex issues, which require highly skilled policy staff, work to resolve. The incumbent makes recommendations about these difficult problems which are authoritative, subject to review by the DAS and the Policy Director. Subject to the general guidance of the Director, the incumbent can make recommendations directly to the DAS or other Multifamily Housing policy officials concerning critically important policy issues, which the Director has assigned.

The incumbent's specific duties and responsibilities follow:

- Analyzes programs and policy options and develops options papers and policy proposals; analyzes new or proposed program policies and their impact on current overall housing policies; develops program designs to implement new programs and policies authorized by Congress for which organizational responsibility has not been assigned; develops legislative proposals and coordinates their development by program shops; reviews and analyzes legislative proposals and their impact on existing programs.

- Prepares testimony for appearances of program officials before Congressional committees.
- Prepares and coordinates with program offices and preparation of briefing materials for these officials and explanatory materials for use by Congressional committees in relations to proposed legislation; develops proposals concerning regulations for the Office of General Counsel; tracks and expedites the development elsewhere in the Office of Multifamily Housing and the Department, of regulations in these issue areas and coordinates the development of regulations in these areas with the Office of General counsel and the Multifamily Housing program offices, and assists in resolving issues arising in the development of these regulations; manages development of the Office of Multifamily Housing strategic plans, including coordination with other HUD and outside organizations, and reporting on progress against key HUD and office priorities; incorporates results of evaluation, research, trend and policy analyses in developing planning activities; In coordination with the Office of Policy Development and Research (PDR), prepares program effectiveness evaluations and recommends and develops research programs and negotiates issues regarding funding and implementation of these proposals; monitors research contracts and the results of such research; and prepare policy proposals that are based on the results of research; and performs other related duties as assigned.

FACTOR LEVELS

FACTOR 1- KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge at a level to serve as an expert in the application of a wide range of qualitative and or quantitative methods for the assessment and improvement of program effectiveness or the improvement of complex management processes and systems.
- Knowledge of a comprehensive range of administrative laws, policies, regulations, and precedents applicable to the administration of one or more important public programs.
- Knowledge of agency program goals and objectives, the sequence and timing of key program events and milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within the employing bureau or other agencies.
- Skill to plan, organize, and direct team study work and to negotiate effectively with management to accept and implement recommendations, where the proposals involve substantial bureau resources, require extensive changes in established procedures, or may be in conflict with the desires of the activity studied.

FACTOR 2 - SUPERVISORY CONTROLS

The employee is subject only to administrative and policy direction concerning overall project priorities and objectives. The employee is typically delegated complete responsibility and authority to plan, schedule, and carry out major projects concerned with the analysis and

evaluation of programs and organizational effectiveness. Analyses, evaluations, and Management officials only for potential normally review recommendations developed influence on broad agency policy objectives and program goals.

FACTOR 3 - GUIDELINES

Guidelines consist of basic administrative policy statements concerning the issue or problem being studied. The employee uses judgment and discretion in interpreting and revising existing policy regulatory guidance for use by others. Some assignments may involve the review of proposed regulations that would significantly change the basic character of agency programs or the way the agency conducts its business with the public or with private industry. Develops study formats for use by others on a project team or at subordinate echelons in the organization.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies that require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs that are significantly varied and require many different unrelated processes and methods that are applied to a broad range of problems and situations that require a substantial depth of analysis. Decisions involve largely undefined areas and issues and require extensive probing and analysis to determine the scope of the problem. The work requires establishing criteria or developing new information.

Assignments are of considerable breadth and intensity and require the participation and support of others. The work requires continuing efforts to establish concepts, theories, or programs, or to resolve unyielding problems.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major program aspects of substantive, mission-oriented programs. The work involves isolating and defining unknown conditions, resolving critical problems, or developing new theories. The employee is recognized as an expert to the experts and his/her work affects the work of other experts. The work directly affects the development of other major aspects of PIH programs and missions, or the well-being of a substantial number of people. The work involves developing, and carrying out vital programs which are essential to the overall mission of the Department.

FACTORS 6 AND 7 - PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts are with high-ranking officials (SES and above) and Members of Congress at the national levels outside the Department. Officials contacted are relatively inaccessible and the various parties involved may be unclear as to the role and authority of the other parties and conducted under differing ground rules.

The purpose of contacts is to justify, defend, negotiate, and settle matters involving significant or controversial issues. The work usually involves active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or

importance. The people contacted have diverse viewpoints, goals, or objectives and therefore, the incumbent is required to achieve a common understanding among various parties and a satisfactory solution that addresses their various objectives and concerns.

FACTOR 8 - PHYSICAL DEMANDS

No unusual physical exertion is required.

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an office setting.

DRAFT

GENERAL POSITION DESCRIPTIONS

Management Analyst

GS-0343-12

INTRODUCTION

The Office of the Assistant Secretary for Housing - Federal Housing Commissioner is responsible for developing, implementing, and maintaining the mortgage insurance and multifamily housing programs and related functions for production, financing, and management of such housing and the conservation and rehabilitation of housing stock or related regulatory functions.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent provides Program support and assistance to facilitate in the analysis and development of policy, procedures, instructions, legislation and research and performs the following specific functions:

- Develops management plans, procedures, and methodology;
- Conducts studies of efficiency and recommends changes or improvements in organization, staffing, or procedures;
- Develops procedures and systems for establishing, operating, and assessing the effectiveness of control systems such as those designed to prevent waste, loss, unauthorized use, or misappropriation of assets;
- Identifies resources (staff, funding, equipment of facilities) required to support varied levels of program operations;
- Reviews administrative audits and investigative reports to recommend appropriate changes or corrective action required;
- Develops life cycle cost analyses of projects or performing cost benefits or economics evaluations of current or projected programs in support of Housing's Information Technology (IT) investments;
- Researches and investigates new or improved business and management practices for application to Housing programs or operations;

- Develops new or modified program policies, regulations, goals, or objectives; and
- Identifies data required for use in the management and direction of programs, in support of Housing's data, information, and reporting requirements.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of qualitative or quantitative methods for assessing and improving the efficiency which Housing's programs are delivered to clients.
- Comprehensive knowledge and skills in the use of microcomputers.
- Knowledge of the organizational structure, functions and procedures of Housing, and their relationships with the other program areas of the Department.
- Skill and knowledge in applying analytical and evaluative methods and techniques to assignments in order to develop appropriate conclusions.
- A high degree of ability to assemble and analysis relevant facts and draw appropriate conclusions.
- Considerable skill in presenting accurate findings and a high degree of ability to make feasible and responsive recommendations both orally and in writing.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent and supervisor develop the work plans and the employee is responsible for planning and conducting the study. Completed work is reviewed for compatibility with Housing's goals and objectives.

FACTOR 3 - GUIDELINES

The incumbent is guided by oral instructions; laws decisions, rules and regulations governing Housing and related programs; a wide variety of HUD management policies; standard techniques and methods of information gathering and analysis; and standard program management principles and practices.

FACTOR 4 - COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing and administering a specific Housing program, and or developing criteria for evaluating its effectiveness. The Analyst must consider uncertainties about the data when developing options and recommendations for management consideration.

FACTOR 5 - SCOPE AND EFFECT

The work involves assisting in establishing criteria for assessing program effectiveness; reviewing, investigating and analyzing a variety of unusual conditions; and ensuring that the Secretary and Assistant Secretary receive timely, accurate and complete data and project information for use in conjunction with out of town travel, meeting, speeches and other events. Work also ensures that Housing policies, legislation and research programs are consistent with Housing programs and Departmental priorities and that their impacts are fully described and understood.

FACTOR 6 - PERSONAL CONTACTS

Contacts within the Department are with co-workers in the Division and with Housing staff in Multifamily program areas; Housing's Office of Operations; HUD's Office of the Chief Procurement Office (OCPO); and Office of the Chief Information Officer (OCIO). In conjunction with certain support assignments there is limited contact with designated persons outside of HUD.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are primarily for the purpose of obtaining, project related data and information and for exchanging views on Housing policies, legislation and research which affect various Housing programs.

FACTOR 8 - PHYSICAL DEMANDS

The work involves walking, standing and carrying of documents. Some exposure to weather conditions is involved when traveling in the performance of duties.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a normal office environment.

Management Information Specialist

GS-0301-14

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs. The incumbent is responsible for oversight of a broad range of management information systems, and provisions of administrative support services required for the operation of the program office.

MAJOR DUTIES AND RESPONSIBILITIES

- Provides technical advice and assistance to the Director of the office on overall computer guidance and direction for data processing projects affecting all aspects of the program office.
- Recommends actions and projects, as appropriate, outlines needed resources, projected time frames and required coordination.
- Represents the organization in leading project teams comprised of program office staff personnel.
- Conducts and plans projected work processes, operational practices needs assessments that will affect program office operations.
- Independently performs difficult and responsible assignments concerning planning, design, development, implementation, control and coordination of a diverse set of complex automated processing systems of national scope.
- Conducts field visits, as appropriate, to data processing installations servicing centers directly and to other organizations which directly provide computer services in support of Headquarter programs to evaluate the feasibility of applying automated techniques in support of Departmental programs.
- Provides technical assistance and technical guidance to program office regarding package software, application software, communications and hardware issues.
- Conducts and or coordinates training for staff usually as automated systems are implemented.
- Identifies problems and specific issues throughout the program office.

- Conducts preliminary analysis of systems to help determine the nature of requirements and whether advanced management information systems technology should be implemented.
- Develops and implements sophisticated data processing methods and techniques to carry out directly audits of management information activities and provides, as necessary, advice, assistance and direction to others in carrying out management information systems projects.
- Provides advice, assistance and direction to others in carrying out management information systems activities.
- Tests and debugs critical portions of software used.
- Analyzes products, feasibility studies, computer system specifications, audit reports and recommendations.
- Evaluates alternative means for completing management information systems projects, such as the use of mini and microcomputers and computer networks.
- Develops and implements innovative computer techniques for use in support of management information systems including user friendly techniques to encourage more efficient and effective conduct of audits and investigations.
- Coordinates development of standards, guides, and policies.
- Performs and conducts activities consistent with program office and EC Web management.
- Maintains projects in ITIPS for program office.
- Prepares IT budget feasibility and project justification studies, as required.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of management of digital computer systems.
- Expert knowledge of the technical characteristics of other computer equipment and software, including application software, data representations and operating systems.

- Ability to use advanced development and testing techniques.
- Knowledge of data processing theory, concepts and practices.
- Skills and ability in applying knowledge to assignments involving computer software and hardware used by the Department and external organizations in support of program office activities.
- Ability to select efficient and effective management information systems methods for use in meeting administrative and programmatic needs in a wide variety of management information systems environments.
- Ability to exercise considerable resourcefulness in identifying the most effective and efficient techniques for meeting specific objectives, planning projects and executing steps to obtain the desired results.
- Ability to suggest unique processing approaches and alternative methods for meeting the objectives based on the availability of existing data, software and hardware.
- Skill in the design and operation of automated management information systems.
- Knowledge of the design and operation of automated management information systems.
- Skill in exercising HUD project management techniques.
- Ability to design, build an implement database systems.
- Skill in implementing HUD information technology budget policies including ability to work with ITIPS.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor reviews work for soundness of overall approach and effectiveness in meeting requirements or expected results. The use of management information techniques is considered technically authoritative and is normally accepted without change.

FACTOR 3 - GUIDELINES

Guidelines include professional data processing texts, Federal Information Processing Standards established by the National Bureau of Standards, Handbook and Operation documents which describe the Department's and other entities, data processing installation policies, procedures and methods and system development documentation for any of the Department's automated systems, functional requirements documents system, specifications computer program,

specifications test plans, conversion plans users handbooks terminal, operators handbook and computer operations guides. The incumbent uses the concepts and techniques presented in the guidance described above to identify the techniques that can most effectively be applied to the activities involving the use of management information. While the goals to be achieved are usually clear, the incumbent must exercise considerable resourcefulness in identifying the most effective and efficient techniques for meeting the specific objectives, planning projects and executing steps to obtain the desired results. The incumbent must suggest unique processing approaches and alternative methods for meeting the objectives based on the availability of existing data software and hardware.

FACTOR 4 - COMPLEXITY

Work at this level is characterized by broad assignments involving the whole gamut of program office activities. The incumbent may perform work on any of the automated systems used by the organization. Decisions on which system can be used to meet the desired objective and the most effective techniques available to achieve these objectives frequently require extensive probing analysis.

Substantial technical analysis is required to develop the most effective techniques for meeting the objectives within short timeframes. This frequently requires integrating various types of hardware and software to resolve difficult technical matters, and closely coordinating project activities with key data processing professionals within the program office and other compatible Departmental areas.

FACTOR 5 - SCOPE AND EFFECT

The incumbent's work has a significant effect on the manner in which the automated programs are used thus enabling the organization to save resources and to more easily identify problem areas requiring management improvements. The work affects the functioning of standardized applications and consequently a wide variety of subject matter functions carried on throughout the department.

The incumbent's efforts make it possible to conduct tests effectively and efficiently of the organization's operations which carry out HUD programs.

FACTOR 6 - PERSONAL CONTACTS

The incumbent's personal contacts primarily include daily contacts with a wide variety of individuals, including data processing experts within HUD, high-ranking computer professionals in outside organizations, equipment and software vendors, contract personnel, program managers within HUD and external organizations which carry out HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The incumbent must occasionally justify, defend, negotiate or settle matters involving significant or controversial issues. At this level, the incumbent attends meetings to accomplish such goals as giving overall direction to the organization's activities. Those individuals contacted have diverse viewpoints, goals and objectives concerning the issue or problems of the

Department. The incumbent must also coordinate project efforts to achieve solutions that will meet the organizational needs. In addition, the incumbent is expected to advise management on the long range changes needed in organization's data processing plan and policies, as required.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary. Some work may require walking and standing in conjunction with travel and to attend meetings and conferences away from the work site. The work does not require any special physical effort.

FACTOR 9 - WORK ENVIRONMENT

The work is adequately lighted, heated, and ventilated. The work environment involves everyday risks or discomforts that require normal safety precautions. Some employees may occasionally be exposed to uncomfortable conditions in such places as research and production facilities.

DRAFT

Management Information Systems Officer: Director, Information Technology (IT)

**Information Technology (IT) Investment Management and Customer Outreach Division
GS-0301-15**

INTRODUCTION

The incumbent serves as the Director, IT Investment Management and Customer Outreach Division, located within the Program Systems Management Office, under the Deputy Assistant Secretary for Multifamily Housing (MFH) Programs. The incumbent supervises a professional staff of management information specialists and housing program managers and directs the development of information systems and policies impacting system activities within HUD Multifamily Housing Offices at Headquarters and the HUD Regions and Field Offices.

This position requires in-depth understanding of multifamily housing policy as well as thorough knowledge of the diverse programs under the control of the Deputy Assistant Secretary for Multifamily Housing programs and the relationship of these programs with those administered by other federal agencies. The incumbent must possess a thorough knowledge of information strategies and data analysis techniques to produce decision information for top management, operating information for program managers and for inter-agency transfers or exchanges with the private sector. The incumbent, as the information systems advisor to the Deputy Assistant Secretary and Program Systems Management Office Director, must have an interdisciplinary background with creative ingenuity and expertise in housing policy, financial and information systems and computer science. It is also required that the incumbent possess expertise in handling complex tasks associated with the management of an organization which daily interfaces with top departmental management and policy offices, other governmental agencies, the Congress and others on sensitive issues.

The incumbent performs the following specific duties:

- Directs a program for providing technical advice and guidance to HUD Multifamily headquarters in the acquisition of computer hardware, software, and services. Works directly with national housing associations and private software vendors to develop functional systems specifications to guide Multifamily system development. Guides and coordinates the development of compatible automated systems to provide the direct interface of Multifamily systems with dependent HUD computer systems.
- Directs the design, development, implementation and maintenance of all information systems in the Office of Multifamily Housing (MFH) programs. Expedites and coordinates the flow of information regarding Multifamily housing programs assuring the data are accurate, timely, relevant, cost beneficial and displayed in a meaningful full manner.

- Maintains overall responsibility for the liaison activities with users of operational information.
- Specifically, the Deputy Assistant Secretary for Multifamily Housing, program managers within MFH, other Departmental managers in Headquarters, Regions and Field Offices. In addition special attention must be given to outside users, especially individual Senators, members of Congress, Congressional committees, the Office of Management and Budget, the General Accountability Office (GAO), and others in the public and private sector, because of the sensitivity of many of the highly complex requests for information and analysis.
- Serves as a principal consultant and advisor to top management on Multifamily housing statistical information systems. The incumbent represents MFH on Department and government-wide management information and statistical systems planning sessions, task forces and seminars.
- Establishes, reviews, and coordinates the many functions, programs, policies and procedures involved in the overall responsibility of assigning programs and projects to Division staff, discussing overall policies and objectives and providing necessary technical direction during the completion of the program or project. Within the Division, establishes policies and overall guidelines for its operation, especially in the areas of planning, information and statistical support needs and personnel activities.
- Initiates within MFH, coordination with the Office of the Chief Information Officer the plans and evaluation activities of the program offices with regard to ADP applications, budgeting of ADP expenditures, data management and data services.
- Conducts, directs or manages task force studies of proposed data processing applications concerned with complex subject matter covering multiple areas of professional competence. These studies involve the requirements of major multifamily housing programs and include the design of services for the Department, other agencies, private industry or the public at large.
- Performs other duties as assigned.

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

Effect: Impacts HUD's headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the nation's population, the nation's housing industry; and receives frequent Congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the general supervision of the Director of the Program Systems Management Office, a Senior Executive Service (SES) member who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent reports to the Office Director, from whom he/she receives administrative and policy supervision. The Division Director exercises broad latitude in carrying out assigned program responsibilities, within a specific framework of delegations of authority. Supervision of the incumbent consists primarily of clarifying instructions regarding overall housing goals and objectives or interpretations of Departmental or Administration housing policies. The Division Director, working along with the Office Director, exercises managerial responsibility for all employees in the IT Investment Management and Customer Outreach Division. The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B - Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

DRAFT

Management Information Systems Officer: Director, Information Management and Cyber Security

**Information Management and Cyber Security Awareness Division
GS-0301-15**

INTRODUCTION

The incumbent serves as the Director, Information Management and Cybersecurity Awareness Division, located within the Program Systems Management Office, under the Deputy Assistant Secretary for Multifamily Housing (MFH) Programs. The incumbent supervises a professional staff of management information specialists and housing program managers and directs the development of information systems and policies impacting system activities within HUD Multifamily Housing Offices at Headquarters and the HUD Regions and Field Offices.

This position requires in-depth understanding of multifamily housing policy as well as thorough knowledge of the diverse programs under the control of the Deputy Assistant Secretary for Multifamily Housing programs and the relationship of these programs with those administered by other federal agencies. The incumbent must possess a thorough knowledge of information strategies and data analysis techniques to produce decision information for top management, operating information for program managers and for inter-agency transfers or exchanges with the private sector. The incumbent, as the information systems advisor to the Deputy Assistant Secretary and Program Systems Management Office Director, must have an interdisciplinary background with creative ingenuity and expertise in housing policy, financial and information systems and computer science. It is also required that the incumbent possess expertise in handling complex tasks associated with the management of an organization which daily interfaces with top departmental management and policy offices, other governmental agencies, the Congress and others on sensitive issues.

The incumbent performs the following specific duties:

- Directs a program for providing technical advice and guidance to HUD Multifamily headquarters in the acquisition of computer hardware, software, and services. Works directly with national housing associations and private software vendors to develop functional systems specifications to guide Multifamily system development. Guides and coordinates the development of compatible automated systems to provide the direct interface of Multifamily systems with dependent HUD computer systems.
- Directs the design, development, implementation and maintenance of all information systems in the Office of Multifamily Housing (MFH) programs. Expedites and coordinates the flow of information regarding Multifamily housing programs assuring the data are accurate, timely, relevant, cost beneficial and displayed in a meaningful full manner.

- Maintains overall responsibility for the liaison activities with users of operational information. Specifically, the Deputy Assistant Secretary for Multifamily Housing, program managers within MFH, other Departmental managers in Headquarters, Regions and Field Offices. In addition special attention must be given to outside users, especially individual Senators, members of Congress, Congressional committees, the Office of Management and Budget, the General Accountability Office (GAO), and others in the public and private sector, because of the sensitivity of many of the highly complex requests for information and analysis.
- Serves as a principal consultant and advisor to top management on Multifamily housing statistical information systems. The incumbent represents MFH on Department and government-wide management information and statistical systems planning sessions, task forces and seminars.
- Establishes, reviews, and coordinates the many functions, programs, policies and procedures involved in the overall responsibility of assigning programs and projects to Division staff, discussing overall policies and objectives and providing necessary technical direction during the completion of the program or project. Within the Division, establishes policies and overall guidelines for its operation, especially in the areas of planning, information and statistical support needs and personnel activities.
- Initiates within MFH, coordination with the Office of the Chief Information Officer the plans and evaluation activities of the program offices with regard to ADP applications, budgeting of ADP expenditures, data management and data services.
- Conducts, directs or manages task force studies of proposed data processing applications concerned with complex subject matter covering multiple areas of professional competence. These studies involve the requirements of major multifamily housing programs and include the design of services for the Department, other agencies, private industry or the public at large.
- Performs other duties as assigned.

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

Effect: Impacts HUD's headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the nation's population, the nation's housing industry; and receives frequent Congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the general supervision of the Director of the Program Systems Management Office, a Senior Executive Service (SES) member who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent reports to the Office Director, from whom he/she receives administrative and policy supervision. The Division Director exercises broad latitude in carrying out assigned program responsibilities, within a specific framework of delegations of authority. Supervision of the incumbent consists primarily of clarifying instructions regarding overall housing goals and objectives or interpretations of Departmental or Administration housing policies. The Division Director, working along with the Office Director, exercises managerial responsibility for all employees in the Information Management and Cybersecurity Assurance Division. The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B - Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

DRAFT

Supervisory Deputy Director, Office of Programs Systems Management

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Program Systems Management. The Office is responsible for developing and enhancing the automated systems that support multifamily programs. The Office will also coordinate multifamily contract funding.

As Deputy Office Director, the incumbent of this position is a principal advisor to the Office Director regarding the legislative, regulatory, procedural, budgetary, and long range strategic planning related to the development and implementation of automated systems for the support of multifamily programs.

MAJOR DUTIES AND RESPONSIBILITIES

As Deputy Office Director, the incumbent works closely with the Office Director in carrying out the activities of the Office. In this capacity, he she works with the Office Director in carrying out the following responsibilities:

- Directs the development of policies and procedures, notices, operating guidelines, and regulations regarding automated systems to support multifamily programs.
- Directs the evaluation of the effectiveness and efficiency of automated systems, and their impact upon the day-to-day management of multifamily programs.
- Directs the overall interpretation of procedures and the provision of guidance and assistance to multifamily field and Headquarters components, and other Departmental partners.
- Directs the provision of technical assistance to field components and other HUD and industry entities concerning automated systems. Functions include:
 - Clarifying and interpreting program guidelines, standards, and procedures;
 - Implementing guidance and assistance regarding new or revised technical standards and procedures;
 - Providing specialized advice and assistance concerning problem areas or projects under the jurisdiction of individual multifamily field components;
- Directs the participation of assigned staff in Office of Housing field reviews and Departmental field evaluations. Functions include:

- Developing program evaluation criteria and standards for evaluation;
- Participating, as required, in field reviews and providing assistance in the interpretation of field review data pertaining to program operations;
- Developing necessary changes in policies, guidelines or operating procedures, based upon findings; and
- Developing remedial training as necessary for field personnel.
- Coordinates the design or development of information systems; and data output necessary for management decision-making.
- Directs development of technical training to assist in accomplishing effective implementation of program regulations, policies, and procedures.
- Directs analysis and preparation of budgets for assigned programs, and coordinates with other applicable offices during the annual federal budget cycle.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

Effect: Impacts HUD's headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the Nation's population, the nation's housing industry; and receives frequent congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the general supervision of the Director of the Office of Program Systems Management, an SES, who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent reports to the Office Director, from whom he she receives administrative and policy supervision. The Deputy Director exercises broad latitude in carrying out assigned program responsibilities, within a specific framework of delegations of authority.

Supervision of the incumbent consists primarily of clarifying instructions regarding overall housing goals and objectives or interpretations of Departmental or Administration housing policies.

The Deputy Office Director, working along with the Office Director, exercises managerial responsibility for all employees in the Office of Program Systems Management.

The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts:

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B - Purpose of Contacts:

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

OFFICE OF MULTIFAMILY ASSET MANAGEMENT AND PORTFOLIO OVERSIGHT

Senior Advisor

GS-0301-13/14

INTRODUCTION

This position is located in the Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight (OAMPO), in the U.S. Department of Housing and Urban Development (HUD). The Office of Asset Management & Portfolio Oversight is responsible for oversight of multifamily project assets after their development. The Office develops policy for, and oversees, field office asset management operations, administration of the outsourcing of project-based Section 8 Contract Administration and for the administration of subsidy contracts under multifamily rental subsidy programs. The Office is also responsible for directing and overseeing the housing assistance and grant programs administered by the Office of Multifamily Housing. These programs include project-based Section 8 housing assistance, Section 202/811 capital advance and project rental assistance programs, Assisted-Living Conversion Program (ALCP), Rent Supplements, Service Coordinator, Congregate Housing Services Grant Programs, Pre-Development Grant, Section 811 Project Rental Assistance Demonstration Program (PRA Demo), Demonstration Program for Elderly housing for Intergenerational Families, Emergency Capital Repair Program (ECRP). This office is also responsible for all property disposition functions.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's duties include a wide range of management and oversight of matters covered by the Office as well as providing advice and guidance to senior management in headquarters, field staff and other HUD program offices. It includes representing the Department in negotiations with entities within HUD, other Federal agencies, or others involved in the assigned programs. The incumbent develops policy or procedures in response to statutory changes, identified problems or policy changes, new initiatives, and emerging programs. The incumbent provides authoritative guidance to HUD senior management in headquarters and field staff in interpreting outstanding policies relative to responsibilities of the Office. The incumbent has extensive contact with key Departmental officials and may be required to coordinate the work or train other Department staff on an assignment basis. Incumbent independently performs the following duties with respect to program management and oversight:

- Develops major policy, guidelines, procedures, and regulations and trains field offices with guidance on covered areas.
- Proactively identifies and resolves individual issues, and interprets regulatory and policy issues.

- Prepares for and makes presentations at industry meetings including multifamily Owners, management agents, tenants, lenders, investors, Public Housing Authorities.
- Independently identifies needs, analyzes and proactively originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Originates correspondence to inquiries from lenders, industry, field offices, Members of Congress and individuals which require sophisticated, complex responses.
- Manages performance of field offices, contractors, and stakeholders relative to meeting the objectives of the respective programs, complying with the requirements, statutes, regulations, notices, and policy guidance controlling the respective programs, and recording and reporting activity sufficient to meet program and audit requirements; develops and recommends allowable and appropriate actions and sanctions in the event of unacceptable performance.
- Leads policy development on technical issues related to assigned areas and programs, and coordinates with appropriate headquarters or field office responsible for these areas.
- Represents the office in dealing with key officials and other elements of HUD, other government agencies, private industry representatives and members of Congress with respect to the insurance programs.
- Proactively identifies responsible parties with the office of Finance and Budget, CFO, CIO, and others on issues of compliance, non-compliance, and audits, and resolves issues and problems within the purview of those offices as related to assigned areas and programs.
- Directs the development of technical training and instructional material to assist HUD field personnel.
- Directs the development of technical training and instructional material to assist in accomplishing duties of the Office.
- Serves as a Team Leader when appropriate.
- Provides expert opinion on 1-off assignments, including position or option papers on specialized problem areas of a priority nature.
- Leads initiatives and serves as liaison with headquarters, field offices, and other HUD program areas relative to program implementation and administration, data systems, procurement, funding control, training, audits and other matters covered by the office.
- Performs reviews and evaluations of headquarters and field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas where weaknesses are observed.
- Serves as an expert for assigned programs within the purview of the Office.
- As assigned by the Director, oversees contracts to support office objectives.
- Provides expert knowledge in directing deliverables and ensuring performance in the contract.
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of multifamily housing structure, missions, policies, programs, functions and their organizational relationships.
- Expert knowledge of work and task distribution to improve efficiency of policy and program support operations.
- Expert knowledge of policies, programs, and best practices in green building and energy efficiency in multifamily housing, and/or mixed finance recapitalization strategies for federally assisted properties. Knowledge of pertinent laws, regulations, policies and precedents that affect the assigned areas and related support resources.
- Knowledge of analytical and evaluative methods plus a thorough understanding of how regulatory programs are administered so that the selection and application of appropriate evaluation and measurement techniques can be achieved.
- Ability to make formal and informal presentations (both written and oral).

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent, who is subject only to general administrative and policy direction, works under the broad supervision of the Director, Office of Asset Management & Portfolio Oversight. Being viewed as a technical and administrative authority on assigned housing programs, the incumbent exercises significant initiative, independence, and judgment in executing plans, designs, schedules, and in carrying out programs, projects, studies, etc. concerned with the analysis and evaluation of housing programs or procedural effectiveness. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for potential influence on program goals and policy objectives and are normally accepted as presented.

FACTOR 3 – GUIDELINES

The incumbent must exercise considerable initiative and independent judgment in conducting operations. Guidelines include reference books, HUD manuals, HUD releases, and broad and complex policy directives and regulations from OAMPO.

Manuals, internal guidelines, and directives on administrative policy are available for reference but are stated in general terms. A large body of unwritten policies, precedents, and practices which are not completely applicable are also taken into consideration. Guidelines for performing assignments are scarce and of limited use due to the advanced and technical nature of assignments or problems encountered.

The incumbent is required to use resourcefulness, initiative, discretion, and seasoned judgment based on experience to interpret and revise existing policy and regulatory guidance and to extend traditional methods and practices in developing solutions to problems where precedents are not applicable. This level may include responsibility for development of new material for use OMO wide, or to supplement and explain existing OAMPO guidance.

FACTOR 4 – COMPLEXITY

Typical assignments require developing policy or procedures in response to statutory changes, identified problems or policy changes, new initiatives, and emerging programs; developing detailed plans and goals for implementing a specific Housing program or business area; providing advisory services to HUD senior management; and/or developing criteria for evaluating the effectiveness of the specific Housing program policies and procedures.

Assignments involve implementation of high-level policy decisions and federal legislation having nationwide impact. The work requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation and conditions, and determining a course of action from various alternatives. Work is extremely sensitive, intricate, and technically factual; involving complex problems, policy and procedural issues, and Federal regulations and laws.

Work requires the incumbent to develop procedures and systems for assessing and evaluating the effectiveness of programs, management processes, and program accomplishments. The incumbent's assignments require that he/she be especially versatile and innovative in order to recognize possible new directions or approaches and are dependent upon the incumbent's ability to initiate, direct, coordinate and perform various complex tasks. The work is further complicated by conflicts of interest, working under pressure, and working in an environment that requires consensus from multiple parties with sometimes competing objectives.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analyses of a variety of housing areas to assess aspects of developing mission-oriented program alternatives; developing major policy, guidelines, procedures, and regulations; and identifying needs, and proactively originating necessary changes to regulations and administrative publications to assure program or operational viability. Work involves establishing criteria to measure, evaluate, and/or predict the attainment of program or organizational goals and objectives. Work may also include developing program guidance for application in varied geographic locations.

Work contains findings, recommendations, and authoritative guidance of major significance to top agency management and contributes to the improvement of productivity, effectiveness, and efficiency in program operations at headquarters as well as different geographical locations within the organization.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other specialists in the Department, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints; and to influence manager's officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office.

DRAFT

Assisted Housing Oversight (Rental Assistance Contracts) Division

Branch Chief, Contract Administrator Oversight Monitor

GS-1101-14

INTRODUCTION

The position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Monitoring Oversight Branch (MOB) and is supervised by and responsible to the Division Director. The position requires detailed practical knowledge of a wide range of policies and procedures for the servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 programs, the Section 8 Project Based programs, real estate principles, construction, government contracting process and accounting finance. The incumbent is also required to have the skills and experience necessary to oversee and enforce contractual compliance of one or more major contracts for Section 8 contract administration. While acting as a representative of HUD and the Multifamily Hub, the position requires independent action in making determinations, recommendations, and investigations that involve the above programs and areas.

In order to accomplish the functions of the Contract Administrator Oversight Monitor, the incumbent is charged with the responsibility for monitoring, reviewing and directing, if need be, the day-to-day activities of the Section 8 Contract Administrator (CA). This activity would include tracking work progress and status, estimating and reporting on work completion, instructing the Supervisory Project Manager responsible for Section 8 oversight activities, in specific tasks and job techniques, responding to and assisting with technical issues and problems, reporting on work performance and training needs for both HUD staff and the CA, and administering other duties as they impact on the success of the CA contract.

The incumbent personally performs the tasks identified below, and influences the work of team members performing monitoring functions of the contractor. The CAOM periodically advises the Division Director on the success of the oversight function.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is responsible for supervising and managing the efficient and effective coordination of asset management activities through the monitoring of the CA. The incumbent applies an extensive knowledge of management concepts, principles, knowledge of HUD insurance programs, budgetary processes and Section 8 administration. The position requires a broad background and experience in various functions, a full and in-depth understanding of HUD Asset Management procedures, the Section 8 program and guidelines and government contracting processes. The skills needed to successfully perform these duties would be the ability to communicate orally and in writing; ability to provide leadership; ability to make decisions independently; ability to analyze complex management and real estate transactions

and provide recommendations; ability to direct and coordinate the work of others; and the ability to retrieve information from HUD systems.

The incumbent's responsibilities include performing duties directly or assuring that duties are completed by the Contract Administrators. The duties include the following:

- Exercises significant responsibility for program operations relating to the administering of the CA contract. The incumbent has responsibility for monitoring, directing and enforcing compliance with the terms of the contract. The incumbent works closely with the Division Director, field staff and Housing Partners.
- Serves as an advisor to the Division Director for Section 8 contract oversight as appropriate.
- Serves as the principal technical resource staff person for the Division Director for advice and guidance on all matters pertaining to the CA contract. The Division Director must be able to place great reliance on technical information and analyses provided by the incumbent.
- The incumbent is considered a senior staff member performing duties involving complex oversight activities. Oversight activities would include monitoring the CA to assure that controversial situations and the development of appropriate solutions to issues are completed in a timely fashion. The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines and to the CA. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- The incumbent provides verbal and written instructions and procedures and provides special instructions for non-routine or complex issues. The incumbent clarifies published guidelines and explains regulatory requirements to support the CA in carrying out its duties in accordance with their contract.
- Performs technical reviews of work in progress or finished work products of the CA and other field staff, for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Division Director, the CA or to HUD staff for improvement of work products in accordance with statutory or regulatory requirements. The incumbent assists in resolving technical work problems not covered by established policies or procedures and works with Headquarters to develop solutions which maybe precedent setting.
- As it relates to the Section 8 CA, provides training to the CA and to other field staff. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends other formal and informal training needs.
- Measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes invoices to assure charges are authorized and appropriate. Identifies unauthorized charges and assures corrective actions are taken.

Measures performance and takes necessary corrective actions to maintain agreed upon schedule and cost. Based on performance trends: forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reviews the CAs handling of customers concerns. Provides status reports on issues to appropriate parties.

- Analyzes and approves all required reporting (work plan, monthly, quarterly and annual reports and qualitative reviews of the CA.
- Serves as the primary point of contact for the CA contract and is responsible for CA compliance with all areas of the contract.
- For the basis of approval or denial of rent increases, or budgets submitted by cooperative housing projects, the incumbent monitors the CA to assure that it adequately reviews and analyzes current and historical project financial data; compares previous annual statements with recent financial information; analyzes current operation expenses and project financial data. Provides supporting documentation and technical arguments as part of negotiations with legal and financial professionals who act on the project owner's behalf. Reviews and evaluates legal documents to determine and ensure compliance with Departmental and other federal, state, and local regulations, requirements, statutes, and policies.
- In conjunction with the field staff, analyzes financial statements of the CA to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenses.
- Monitors the CA to verify that they are properly monitoring and reviewing inspections and do not pay subsidy on projects that fail to meet acceptable standards.
- Monitors the CA to verify that they are properly coordinating activities with the Real Estate Assessment Center (REAC), the Enforcement Center (EC), Headquarters and the Program Centers.
- Monitors the CA to verify that they updating the various computer systems in a timely and accurate fashion.
- Coordinates with the Contract Specialist Contract Officer (OPC) on technical issues which may arise in the administration of the contracts. Works closely with the Contract Specialist Contract Officer (OPC) when issues of non-performance might arise or corrective actions are needed.
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Detailed knowledge of the FHA multifamily mortgage insurance, Section 202 811 programs and the Section 8 program.
- Knowledge of the multifamily housing mission, structure, and organizational relationships.
- Mastery in applying these principles to complex, sensitive, or precedent-setting tasks.

- Ability to make formal and informal presentations; ability to communicate with diverse partners and customers both orally and in writing.
- Ability to work independently and within a team concept.
- Ability to analyze complex management and real estate transactions and provide recommendations solutions.
- Expert knowledge of analytical and evaluative methods, supplemented by a practical knowledge of monitoring techniques, concepts and practices.
- Familiarity with the GTM GTR responsibility.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Division Director. The Branch Chief Contract Administrator Oversight Monitor is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Decisions are always accepted as authoritative by higher authority and completed work is evaluated according to results achieved.

FACTOR 3 – GUIDELINES

Standard reference books, field manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of an advanced practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with is her grade to arrive at a reasonable, workable and good decision. His or her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5- SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of overseeing the managing of the field Section 8 multifamily housing portfolio in a large geographic area. The position serves as the principal focal point for the CA. The work involves analyzing, monitoring and evaluating technical program aspects of substantive contract activities. Oversees the maintenance of technical monitoring files and contract files as appropriate. Provides technical direction and assistance to contractors consistent with contract work descriptions and technical requirements of the contracts. Identifies and documents actual and potential contract performance problems. Develops a range of alternative solutions to contract problems. Teams

with contracting staff to resolve performance problems or establish basis for adverse contract actions.

DRAFT

Branch Chief, Financial Operation Branch

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Financial Operation Branch. The incumbent serves as Branch Chief of the Financial Operations Branch, Office of Assisted Housing Oversight (Rental Assistance Contracts) Division. The Branch will handle all budget and workload associated with the Section 8 Program, including both HUD- and third-party administered contracts. It will also be responsible for monitoring the timely payment of Section 8 housing assistance to administrators and project owners in cooperation with the accounting staff in the Office of the Chief Financial Officer.

The incumbent supervises financial operations analyst and support staff that is skilled in the programs administered by the Branch. He or she performs supervisory and managerial duties to assure that the Branch meets established goals and objectives.

MAJOR DUTIES AND RESPONSIBILITIES

Incumbent is directly responsible for the overall activities of the Branch. In this capacity, him or her:

- Defines broad policy objectives of the Branch to effectuate legislative, regulatory, and administrative goals, policies, and procedures with respect to the assigned programs.
- Directs the development of criteria, instructions, and guidelines to achieve the goals and mission of the Branch.
- Directs the development and implementation of training curricula for use by Headquarters and field staff with respect to the program and operational jurisdiction of the Branch.
- Serves as the principal advisor to the Office Director regarding the programs for which the Branch is responsible.
- Provides information, advice, and guidance to Congressional representatives, Departmental officials, representatives from other governmental agencies, and other clients regarding programs administered by the Branch.
- Coordinates the activities of the Branch with those of other Departmental Program areas to assure the accomplishment of overall goals and objectives.
- Evaluates the effectiveness of policies and procedures developed or implemented by the Branch, and develops recommendations for improvement where necessary.
- Interprets and provides guidance on established procedures to Headquarters and field staff, representatives from other program areas, non-HUD clients, etc.
- Directs the daily activities of the Branch, including:
- Coordinating with other Housing Offices and Divisions on projects involving the Branch responsibilities;

- Planning of work to be accomplished by the staff of the Branch, including establishing goals, priorities, and schedules for work completion;
- Guiding, instructing, advising, and counseling staff members on work assignments, standards, and expectations;
- Evaluating the performance of the Branch staff.

FACTOR LEVELS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent supervises the Financial Operations Branch, which is responsible for the implementation of laws and programmatic changes related to financial operations and disposition through regulations, handbooks, and notices.

Effect: Impacts HUDs headquarters and field operations nationwide; facilitates HUDs accomplishment of its primary mission, programs of national significance; and impacts large segments of the Nation's population, the Nation's housing industry; and receives frequent congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the supervision of the Director of the Office of Assisted Housing Oversight (Rental Assistance Contracts) Division, a GS-15 one level below the first SES, who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbents work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The Branch Chief exercises full managerial responsibility for all employees in the Financial Operation Branch. As Branch Chief, the incumbent assures implementation of the goals and objectives of the Office by planning work to be accomplished, setting and adjusting short and long-term work priorities, and preparing and reviewing work schedules. Determines areas of emphasis, approaches, and initiates methods to increase work quality of office. There are significant responsibilities when it comes to dealing with officials of other units or organizations; making decisions on non-routine, costly or controversial training needs and requests; examining and resolving group grievances or serious employee complaints; reviewing and approving serious disciplinary actions; recommending selections for subordinate positions for coordinating the work of others, and similar positions; approving expenses comparable to within-grade increases, extensive overtime, and employee travel; recommending awards of bonuses for non-supervisory personnel and changes in position classification; subject to approval by higher level officials, supervisors, or others; finding and implementing ways to eliminate or reduce significant barriers to production, promote team building, or improve business practices.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A- Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff. Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-Factor 4B- Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

Contract Administrator Oversight Monitor

GS-1101-13

INTRODUCTION

The position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Monitoring Oversight Branch (MOB) and is supervised by and responsible to the Branch Chief. The position requires detailed practical knowledge of a wide range of policies and procedures for the servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 programs, the Section 8 Project Based programs, real estate principles, construction, government contracting process and accounting finance. The incumbent is also required to have the skills and experience necessary to oversee and enforce contractual compliance of one or more major contracts for Section 8 contract administration. While acting as a representative of HUD and the Multifamily Hub, the position requires independent action in making determinations, recommendations, and investigations that involve the above programs and areas.

In order to accomplish the functions of the Contract Administrator Oversight Monitor, the incumbent is charged with the responsibility for monitoring, reviewing and directing, if need be, the day-to-day activities of the Section 8 Contract Administrator (CA). This activity would include tracking work progress and status, estimating and reporting on work completion, instructing the Supervisory Project Manager responsible for Section 8 oversight activities, in specific tasks and job techniques, responding to and assisting with technical issues and problems, reporting on work performance and training needs for both HUD staff and the CA, and administering other duties as they impact on the success of the CA contract.

The incumbent personally performs the tasks identified below, and influences the work of team members performing monitoring functions of the contractor. The CAOM periodically advises the Branch Chief on the success of the oversight function.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is responsible for managing the efficient and effective coordination of asset management activities through the monitoring of the CA. The incumbent applies an extensive knowledge of management concepts, principles, knowledge of HUD insurance programs, budgetary processes and Section 8 administration. The position requires a broad background and experience in various functions, a full and in-depth understanding of HUD Asset Management procedures, the Section 8 program and guidelines and government contracting processes. The skills needed to successfully perform these duties would be the ability to communicate orally and in writing; ability to provide leadership; ability to make decisions independently; ability to analyze complex management and real estate transactions and provide recommendations; ability to direct and coordinate the work of others; and the ability to retrieve information from HUD systems.

The incumbent's responsibilities include performing duties directly or assuring that duties are completed by the Contract Administrators. The duties include the following:

- Exercises significant responsibility for program operations relating to the administering of the CA contract. The incumbent has responsibility for monitoring, directing and enforcing compliance with the terms of the contract. The incumbent works closely with the Division Director, field staff and Housing Partners.
- Serves as an advisor to the Branch Chief for Section 8 contract oversight as appropriate.
- Serves as the principal technical resource staff person for the Branch Chief for advice and guidance on all matters pertaining to the CA contract. The Branch Chief must be able to place great reliance on technical information and analyses provided by the incumbent.
- The incumbent is considered a senior staff member performing duties involving complex oversight activities. Oversight activities would include monitoring the CA to assure that controversial situations and the development of appropriate solutions to issues are completed in a timely fashion. The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines and to the CA. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- The incumbent provides verbal and written instructions and procedures and provides special instructions for non-routine or complex issues. The incumbent clarifies published guidelines and explains regulatory requirements to support the CA in carrying out its duties in accordance with their contract.
- Performs technical reviews of work in progress or finished work products of the CA and other field staff, for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Branch Chief, the CA or to HUD staff for improvement of work products in accordance with statutory or regulatory requirements. The incumbent assists in resolving technical work problems not covered by established policies or procedures and works with Headquarters to develop solutions which maybe precedent setting.
- As it relates to the Section 8 CA, provides training to the CA and to other field staff. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends other formal and informal training needs.
- Measures and monitors performance to assure commitments of all parties are being maintained. Reviews and analyzes invoices to assure charges are authorized and appropriate. Identifies unauthorized charges and assures corrective actions are taken. Measures performance and takes necessary corrective actions to maintain agreed upon schedule and cost. Based on performance trends: forecasts schedules, budgets, manpower, or quality problems and ensures proper resolution of issues raised. Reviews

the CAs handling of customers concerns. Provides status reports on issues to appropriate parties.

- Analyzes and approves all required reporting (work plan, monthly, quarterly and annual reports and qualitative reviews of the CA).
- Serves as the primary point of contact for the CA contract and is responsible for CA compliance with all areas of the contract.
- For the basis of approval or denial of rent increases, or budgets submitted by cooperative housing projects, the incumbent monitors the CA to assure that it adequately reviews and analyzes current and historical project financial data; compares previous annual statements with recent financial information; analyzes current operation expenses and project financial data. Provides supporting documentation and technical arguments as part of negotiations with legal and financial professionals who act on the project owner's behalf. Reviews and evaluates legal documents to determine and ensure compliance with Departmental and other federal, state, and local regulations, requirements, statutes, and policies.
- In conjunction with the field staff, analyzes financial statements of the CA to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenses.
- Monitors the CA to verify that they are properly monitoring and reviewing inspections and do not pay subsidy on projects that fail to meet acceptable standards.
- Monitors the CA to verify that they are properly coordinating activities with the Real Estate Assessment Center (REAC), the Enforcement Center (EC), Headquarters and the Program Centers.
- Monitors the CA to verify that they updating the various computer systems in a timely and accurate fashion.
- Coordinates with the Contract Specialist Contract Officer (OPC) on technical issues which may arise in the administration of the contracts. Works closely with the Contract Specialist Contract Officer (OPC) when issues of non-performance might arise or corrective actions are needed.
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Detailed knowledge of the FHA multifamily mortgage insurance, Section 202 811 programs and the Section 8 program.
- Knowledge of the multifamily housing mission, structure, and organizational relationships.
- Mastery in applying these principles to complex, sensitive, or precedent-setting tasks.
- Ability to make formal and informal presentations; ability to communicate with diverse partners and customers both orally and in writing.
- Ability to work independently and within a team concept.

- Ability to analyze complex management and real estate transactions and provide recommendations solutions.
- Expert knowledge of analytical and evaluative methods, supplemented by a practical knowledge of monitoring techniques, concepts and practices.
- Familiarity with the GTM GTR responsibility.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Branch Chief. The Contract Administrator Oversight Monitor is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Decisions are always accepted as authoritative by higher authority and completed work is evaluated according to results achieved.

FACTOR 3 – GUIDELINES

Standard reference books, field manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of an advanced practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with is her grade to arrive at a reasonable, workable and good decision. His or her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of overseeing the managing of the field Section 8 multifamily housing portfolio in a large geographic area. The position serves as the principal focal point for the CA. The work involves analyzing, monitoring and evaluating technical program aspects of substantive contract activities. Oversees the maintenance of technical monitoring files and contract files as appropriate. Provides technical direction and assistance to contractors consistent with contract work descriptions and technical requirements of the contracts. Identifies and documents actual and potential contract performance problems. Develops a range of alternative solutions to contract problems. Teams with contracting staff to resolve performance problems or establish basis for adverse contract actions.

Director

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs; Office of Asset Management & Portfolio Oversight and Assisted Housing Oversight (Rental Assistance Contracts) Division. The Office is responsible for the implementation of the Office of Housing's third-party Contract Administration (CA) initiative. The Office monitors, oversees, and provides technical assistance to contract administrators, and assures that third-party contract administered project-based Section 8 subsidized properties continue to meet the Department's goal of providing decent, safe, and sanitary housing to low-income families. In addition, the Office assures that the Department meets its financial obligations to owners as specified in Housing Assistance Payment (HAP) contracts, and coordinates the monitoring and oversight of Contract Administrators to guarantee that they properly manage the Department's project based Section 8 HAP contracts.

The incumbent of this position is a principal advisor to the Deputy Assistant Secretary regarding the legislative, regulatory, procedural, budgetary, and long range strategic planning related to housing assistance contract administration oversight.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is directly responsible for the overall activities of the Office. In this capacity, he she:

- Directs the development of policies and procedures notices, operating guidelines, and regulations regarding housing assistance contract administration oversight.
- Directs the evaluation of policy and procedural effectiveness and methods of operations for assigned programs, along with the quality of program data. This includes the coordination of activities related to CA performance, the provision of technical assistance to CAs, proscription of any remedial actions needed to improve CA performance, and coordinating efforts between the CAs and the local Multifamily field office staff. In addition, directs the handling of all budget and workload associated with the Section 8 Program, including both HUD and third-party administered contracts. The incumbent will oversee the monitoring and timely payment of Section 8 housing assistance to administrators and project owners, and the payment of administration fees to the CAs.
- Directs the overall interpretation of procedures and the provision of guidance and assistance to Multifamily field components, owners, tenants, etc.
- Directs the provision of programmatic and technical assistance to field components and other HUD and industry entities concerning housing assistance contract administration oversight. Functions
- Clarifying and interpreting program guidelines, standards, and procedures;

- Implementing guidance and assistance regarding new or revised technical standards and procedures;
- Providing specialized advice and assistance concerning problem areas or projects under the jurisdiction of individual multifamily field components.
- E. Directs the participation of assigned staff in Office of Housing field reviews and Departmental field evaluations. Functions include:
 - Developing program evaluation criteria and standards for evaluation;
 - Participating, as required, in field reviews and providing assistance in the interpretation of field review data pertaining to program operations;
 - Developing necessary changes in policies, guidelines or operating procedures, based upon findings; and
 - Developing remedial training as necessary for field personnel.
- F. Coordinates with the appropriate offices in the design or development of information systems; and data output necessary for management decision-making.
- G. Directs development of technical training to assist in accomplishing effective implementation of program regulations, policies, and procedures.
- H. Directs analysis and preparation of budgets for assigned programs, and coordinates with other applicable offices during the annual federal budget cycle.

FACTOR LEVELS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: As Director, the incumbent reports to the Office of Asset Management & Portfolio Oversight, from whom he she receives administrative and policy supervision. The Director exercises broad latitude in carrying out assigned program responsibilities, within a specific framework of delegations of authority.

Effect: Impacts HUD's headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the Nation's population, the nation's housing industry; and receives frequent congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the general supervision by the Director of the Office of Asset Management & Portfolio Oversight, one level below the first SES, who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

- Supervision of the incumbent consists primarily of clarifying instructions regarding overall housing goals and objectives or interpretations of Departmental or

Administration housing policies. The Director exercises full managerial responsibility for all employees in the Office of Assisted Housing Oversight (Rental Assistance Contracts) Division.

- The incumbent is responsible for furthering equal opportunity employment by demonstrated evidence of fairness in making selections, encouragement and recognition of employees, and sensitivity to the developmental needs of all employees, including minority groups and women.
- The activities of the Office have a significant national impact on housing assistance contract administration in the Department.
- Exceptional managerial, leadership, and supervising ability to direct a professional staff engaged in developing, implementing, and evaluating policies, procedures, operating guidelines, and Departmental goals.
- Demonstrated ability to interact effectively with high level officials at the Federal, State, and local levels, and with various client and private interest groups.
- Ability to carry out assignments that require a high degree of creativity in gathering and analyzing data, developing regulations and policies, etc.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4 - Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B - Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

Program Assistant (Office Automation)

GS-0303-07

INTRODUCTION

This position is located in the Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, and Assisted Housing Oversight (Rental Assistance Contracts) Division.

MAJOR DUTIES AND RESPONSIBILITIES

- Coordinates administrative matters in the immediate office. Working with the Office Director and Branch Chiefs. The incumbent consolidates all administrative reports including budgetary input, procedure data, management information requirements, etc.
- Initiates necessary correspondence, such as acknowledgement letters, requests for additional information and transmittal memorandums filling in references, dates, citations from manual, regulations, etc., which requires researching and extracting from files and records. Prepares materials in final form, assembles material, with necessary attachments, routes material for appropriate distribution. Conducts appropriate follow-up.
- Assumes and carries out a variety of special assignments, involving the development of methods or operation or improvements in administrative practices of the office procedures and work routines. On the basis of findings, recommends, and assists in the adoption of policies and procedures designed, to improve administrative functions.
- Assists in preparation of issuances, regulations, handbooks, handbook changes, etc.
- As assigned, performs research and gathers background data for use by the Director and Branch Chiefs.
- Assists in special efforts to collect program information and statistical or budget data.
- Assists in the preparation of training sessions.
- Provides staff support for formal presentations, briefings, and meetings.
- Establishes and maintains logs and controls to assure timely accomplishment of work and goals, and events such as conferences, staff meetings, industry meetings, etc. Assists staff in follow-up as necessary.
- Oversees filing of projects and program files to ensure completeness and that correspondence and documents are filed in the most efficient manner. Sets up special files as the need arises, such as subject files, etc., so that information is available for status control and preparation of special reports.
- Performs other related duties as may be assigned.

FACTORS

FACTOR 1- KNOWLEDGE REQUIRED

- Knowledge of the capabilities, operating characteristics, and advanced functions of a variety of types of office automation software, e.g., database, spreadsheet, and word

processing; and knowledge of the similarities, differences; and integration of the difference software types.

- Through knowledge of the programs and organizations for which incumbent is responsible in order to convey instructions to the staff and resolve problems.
- General working knowledge of Federal Housing Administration programs and Housing regulations, directives and handbooks pertaining to the multifamily programs under the Offices jurisdiction, and a familiar knowledge of the Directors or managers view, policies, and special interest. The position also requires a good knowledge of the Departmental organization, and administrative
- This position is located in the Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, and Assisted Housing Oversight (Rental Assistance Contracts) Division.
- The incumbent serves as a technical assistant providing administrative support to the CFS staff procedures.
- General understanding of the procedures and requirements as they relate to the maintenance of records, preparation of statistical and budget reports, and ability to solve administrative problems.
- Knowledge and ability to identify and obtain research and information on housing and related issues.
- Knowledge of personal computer applications to input data and retrieve appropriate automated reports.
- Knowledge and ability to write clear and concise letters or other narrative material. - Ability to work under the pressure of meeting due dates or priority requirements.

FACTOR 2 - SUPERVISORY CONTROLS

Work is performed under the general supervision of the Office Director and Branch Chiefs who makes assignments and sets deadlines for completing the work. The supervisor provides assistance on controversial issues. The employee plans, coordinates, and carries out the successive steps necessary to complete each phase of assigned projects. Work problems are normally resolved by the employee and in accordance with the body of accepted office policies, applicable precedents and training. Work is reviewed for conformance with overall requirements.

FACTOR 3 - GUIDELINES

Guidelines include HUD and Housing regulations, program procedures, manuals, and general regulations of several Federal agencies (OPM, OMB, and Treasury). However, the incumbent frequently must adapt operating procedures to new situations due to frequent program, regulatory, and system changes. In addition, guidelines and agency instructions will be utilized (handbooks, notices, etc.) to keep staff informed of new or changing policies and regulations.

FACTOR 4 - COMPLEXITY

The work principally involves dealing with problems and issues of a procedural nature. The incumbent analyzes the issues in the assignment, then selects and applies accepted techniques

to the resolution of procedural problems. The incumbent works on a staff, which is involved with HUD's Multifamily Housing programs. The duties often entail shifting frequently from one phase or type of work to another. Incumbent must be able to react responsively and with a positive attitude to rapidly changing requirements and adverse conditions, and adapt methods and procedures to new situations.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to coordinate administrative matters in the office, resolve various problems and situations that affect the orderly and efficient flow of work, and perform a variety of special assignments. Work may also involve developing detailed procedures and guidelines to supplement established administrative regulations or guidance. Completed reports and recommendations influence decisions by managers. The work may involve identifying problems and making recommendations concerning the administrative operations in the office.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are by telephone and personal callers to the office from Federal, State, national, regional and local officials, business organizations, citizens, etc., concerning various aspects of Multifamily Housing programs. The contacts are with Congressional staff, State and local officials, public interest organizations and private industry. The incumbent also is in contact with program development employees and employees of other areas of HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of contacts is to give and obtain information regarding compliance with established policies and procedures, and to set up an appointment and conferences.

FACTOR 8 - PHYSICAL DEMANDS

The work is mostly sedentary; however, the incumbent is required to do some walking, standing, bending, and carrying out of light items such as papers, books, files, etc. Otherwise, the position requires long periods of sitting and working on a personal computer. No special physical demands are required to perform work.

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an office setting. The work area is adequately lighted, heated, and ventilated.

Financial Analyst (GS-1160-11)

GS-1160-11

STATEMENT OF DIFFERENCE FOR GS-1160-11 FINANCIAL ANALYST

The incumbent serves as an analyst and advisor for financial matters relating to the Section 8 programs and administration of rental assistance payments to contract administrators, owners and managers. Responsibilities include review and approval of program budgets, reservation and obligation of funds, scheduling of payments, preparation of Annual Contribution Contract (ACC) renewal contracts, review and approval of financial or year-end statements, generation of appropriate financial transactions, and interaction with staff in the field offices for resolution of audit findings related to the financial management of Section 8 program participants. The incumbent is also responsible for the processing, validation and review of data and automated documents submitted to the Financial Operations Branch by Contract Administrators, assisted housing project owners and or agents. Responsibilities also include analyzing data to keep abreast of program compliance and performance operations; serving as a member of any team to assist in developing appropriate solutions to complex issues and problems identified by either remote monitoring or information provided Multifamily Housing systems; and providing technical advice and guidance on financial issues.

THIS IS NOT A COMPLETE PD WITHOUT THE FULL GS-12 DESCRIPTION INCLUDED.

Financial Analyst, GS-1160-12

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Financial Operation Branch. The incumbent performs under general supervision of the Supervisory Financial Analyst.

The Branch is responsible for the review and approval of all Section 8 Program financial documents related to assisted housing programs administered by housing agencies (contract administrators) and private entities such as owners and managers. The Branch's mission is to provide timely and accurate rental assistance payments to contract administrators, owners and managers.

The incumbent serves as an advisor for financial matters relating to the Section 8 programs. Responsibilities include review and approval of program budgets, reservation and obligation of funds, scheduling of payments, preparation of contracts, review and approval of financial or year-end statements, generation of appropriate financial transactions, interaction with staff in the Field Offices for resolution of audit findings related to the financial management of Section 8 program participants. The incumbent is also responsible for the processing, validation and review of data and automated documents submitted to the Branch by Contract Administrators, assisted housing project owners and or agents. Responsibilities also include analyzing data to keep abreast of program compliance and performance operations; serving as a member of any team to assist in developing appropriate solutions to complex issues and problems identified by

either remote monitoring or information provided by the Assessment Center; and providing technical advice and guidance in financial issues.

- Performs technical review and analysis of financial data reported on various documents such as budgets, requisitions, year-end settlement statements, and voucher assistance payments. Uses information from a variety of systems in making determinations regarding approval of program budgets, financial statements and scheduling of payments. Validates certifications, re-certifications detailed adjustments and related data transmitted through TRACS. Validates special claims and logs discrepancies, authorizes or denies claims in TRACS. Systems include, but are not limited to HUDCAPS, TRACS, MTCS and IBS.
- May serve as a Government Technical Monitoring (GTM) as needed for contracts related to the work of the Branch. May perform limited or extensive duties at the direction of the Branch Chief. Full GTM duties would involve: serving as primary liaison with the contractor and the responsible Contracting Officer; ensuring appropriate communication and flow of information; coordinating and monitoring any use of government space and equipment by contractors; participating in pre-award and post-award activities.
- Recommends and implements creative solutions to financial problems and takes an active role in implementing needed changes. Provides expert technical assistance and advice to Field Offices, TARCs, Assessment Center, etc., as necessary on issues relating to the financial management of the Section 8 programs.
- Participates in team assignments as needed to deal with cross cutting financial management issues. When appropriate, participates in teams established to address Section 8 financial management issues problems, to develop appropriate solutions (which often will be extended nationwide) to financial management issues and problems identified by either analysis or data or through contact with Field Office staff or Assessment Center staff.
- Assists the Branch Chief, or other assigned supervisors staff, in monitoring and evaluating management or performance plan goals, including input and feedback into the development and analysis of diagnostic data. Monitors and tracks accomplishment as assigned and provides input into the Management Plan reports, analyzes reports submitted on shortfalls, clarifies issues, resolves problems relating to goals achievement.
- Assists field office staff in monitoring compliance of all programs participants in the financial area e.g., sufficiency of operating reserves, designated check signatories, adequate timekeeping procedures, applicants employment verification, proper applications of the annual adjustment factor and timely recertification of residents. Works with other financial analyst to identify financial trends and coordinates as necessary with cross-functional experts to develop strategies for dealing with these broad trends.
- Provides technical assistance to assigned program participants by responding to questions, and identifying technical assistance needs and assisting in the development

of tailored packages to address those needs using strategies such as peer-to-peer networks and developing accounting systems and cash handling procedures. Plans and conducts training for the assisted housing industry, Hub Field Office staff and other customers on new procedures or policies to be utilized in the transmission of automated program data to the Office.

- Assures timely submission and accuracy of vouchers, special claims and billing related documents. Creates and dispatches discrepancy messages to Hub field offices and owners agents citing required corrective actions for subsequent voucher submissions.
- Conducts appropriate follow-up to recover funds. Develops repayment schedule with owner agent contract administrator and manages debt collection repayment process. Assists in the identification of serious problems and patterns of potential fraud or abuse.
- Prepares and submits various statistical, programmatic and administrative written reports, evaluations, plans and strategies on problems, issues, budgets, training needs assessment, travel and most effective utilization of resources.
- Participates in meetings for the purpose of assessing and preparing recommendations for improved operations and performance. Applying a thorough and comprehensive knowledge of the policies, laws, regulations, procedures and methods of financial management, exercises originality in developing and establishing standards, procedures and instructions necessary to support the Branch and other involved parties.
- Analyzes Assessment Center results data for all program participants and identifying trends, and developing material on e.g., financial management issues, regulatory guidance matters, and program changes for dissemination to the program participants.
- Explores non-HUD sources of technical assistant (e.g., non-profits, universities, etc.), and facilitates effective partnership between HUD, residents and management of organizations and entities participating in the Section 8 program.
- Utilizes available computer equipment and data systems to maintain current financial data, track program participant performance trends and compliance issues, and generate appropriate work products.
- Serves as a technical specialist at local, regional, state and other conferences, seminars, workshops, etc., on Section 8 financial management issues and topics with oral and written presentations.
- Directly provides advice and guidance on situations for program participants on unique situations. Also provides advice and guidance on unique cases which have not been previously encountered and for which there are no national procedures or experience.
- Assists in the control, monitoring, sub-assignment and oversight of allocations of Section 8 funding for the Branch.
- Processes special requests, controlled correspondence and other correspondence as assigned. -Provides targeted technical assistance requiring financial analyst expertise. Contacts involve negotiation and persuasion in obtaining the adoption of technical points and methods that are in conflict with desire and opinions of other financial staff.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and skill in applying rules, regulations, statutes pertaining to financial management and funding aspects of all Section 8 subsidy programs. Knowledge of the oversight process in order to effectively analyze and administer financial operations. Knowledge of trends in pertinent Section 8 programs in order to develop realistic intervention strategies and to provide management and staff with information upon which to develop solutions to any significant downward performance trends developing.
- Comprehensive knowledge of the contract and deliverable work products in order to effectively analyze and evaluate contractor performance.
- Ability to apply problem-solving and analytical techniques to extract and analyze financial data from numerous sources to identify problems, make recommendations, etc., on contract administrators, owners or managers nationwide. Comprehensive financial knowledge needed to determine causes of problems in varying areas of the country with numerous external factors involved.
- Knowledge of HUD accounting and financial reporting policies for Section 8 programs.

FACTOR 2 - SUPERVISORY CONTROLS

Assignments are given in general terms via overall Branch goals and objectives, or as a result of trends identified. The incumbent is independently responsible for planning and carrying out assignments by determining, after identifying problem areas, what additional data should be evaluated so that management specialists will have the information they need to administer the programs. Work is reviewed for consistent interpretation of legal precedents, equitable treatment of clients' contractors, impact on HUD policy, and effectiveness in supporting program objectives. The incumbent's expertise is such that recommendations are usually accepted. The incumbent develops deadlines and project requirements through analysis of performance data, coordination with cross-functional teams dealing with specific issues problems, and the needs of the program participants. The incumbent is considered an authority on financial and budget issues related to the Section 8 programs, and is expected to provide expert advisory assistance and exercise judgment in developing solutions to complex problems whether on an individual or as a member of a team.

Financial Analyst (GS-1160-12)

GS-1160-12

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Financial Operations Branch. The incumbent performs under general supervision of the Branch Chief of the Financial Operations Branch.

The Branch is responsible for the review and approval of all Section 8 program financial documents related to assisted housing programs administered by housing agencies (contract administrators) and private entities such as owners and managers. The Branch's mission is to provide timely and accurate rental assistance payments to contract administrators, owners and managers.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent serves as an advisor for financial matters relating to the Section 8 programs. Responsibilities include review and approval of program budgets, reservation and obligation of funds, scheduling of payments, preparation of contracts, review and approval of financial or year-end statements, generation of appropriate financial transactions, interaction with staff in the Hub Field Offices for resolution of audit findings related to the financial management of Section 8 program participants. The incumbent is also responsible for the processing, validation and review of data and automated documents submitted to the Branch by Contract Administrators, assisted housing project owners and or agents. Responsibilities also include analyzing data to keep abreast of program compliance and performance operations; serving as a member of any team to assist in developing appropriate solutions to complex issues and problems identified by either remote monitoring or information provided by the Assessment Center; and providing technical advice and guidance in financial issues.

- Performs technical review and analysis of financial data reported on various documents such as budgets, requisitions, year-end settlement statements, and voucher assistance payments. Uses information from a variety of systems in making determinations regarding approval of program budgets, financial statements and scheduling of payments. Validates certifications, re-certifications detailed adjustments and related data transmitted through TRACS. Validates special claims and logs discrepancies, authorizes or denies claims in TRACS. Systems include, but are not limited to HUDCAPS, TRACS, MTCS and IBS.
- May serve as a Government Technical Monitoring (GTM) as needed for contracts related to the work of the Division. May perform limited or extensive duties at the direction of the Branch Chief. Full GTM duties would involve: serving as primary liaison with the contractor and the responsible Contracting Officer; ensuring appropriate communication and flow of information; coordinating and monitoring any use of

government space and equipment by contractors; participating in pre-award and post-award activities.

- Recommends and implements creative solutions to financial problems and takes an active role in implementing needed changes. Provides expert technical assistance and advice to Field Offices, TARCs, Assessment Center, etc., as necessary on issues relating to the financial management of the Section 8 programs.
- Participates in team assignments as needed to deal with cross cutting financial management issues. When appropriate, participates in teams established to address Section 8 financial management issues problems, to develop appropriate solutions (which often will be extended nationwide) to financial management issues and problems identified by either analysis or data or through contact with Field Office staff or Assessment Center staff.
- Assists the Branch Chief, or other assigned supervisors staff, in monitoring and evaluating management or performance plan goals, including input and feedback into the development and analysis of diagnostic data. Monitors and tracks accomplishment as assigned and provides input into the Management Plan reports, analyzes reports submitted on shortfalls, clarifies issues, resolves problems relating to goals achievement.
- Assists field office staff in monitoring compliance of all programs participants in the financial area e.g., sufficiency of operating reserves, designated check signatories, adequate timekeeping procedures, applicants employment verification, proper applications of the annual adjustment factor and timely recertification of residents. Works with other financial analyst to identify financial trends and coordinates as necessary with cross-functional experts to develop strategies for dealing with these broad trends.
- Provides technical assistance to assigned program participants by responding to questions, and identifying technical assistance needs and assisting in the development of tailored packages to address those needs using strategies such as peer-to-peer networks and developing accounting systems and cash handling procedures. Plans and conducts training for the assisted housing industry, Hub Field Office staff and other customers on new procedures or policies to be utilized in the transmission of automated program data to the Office.
- Assures timely submission and accuracy of vouchers, special claims and billing related documents. Creates and dispatches discrepancy messages to Hub field offices and owners agents citing required corrective actions for subsequent voucher submissions.
- Conducts appropriate follow-up to recover funds. Develops repayment schedule with owner agent contract administrator and manages debt collection repayment process. Assists in the identification of serious problems and patterns of potential fraud or abuse.
- Prepares and submits various statistical, programmatic and administrative written reports, evaluations, plans and strategies on problems, issues, budgets, training needs assessment, travel and most effective utilization of resources.
- Participates in meetings for the purpose of assessing and preparing recommendations for improved operations and performance. Applying a thorough and comprehensive

knowledge of the policies, laws, regulations, procedures and methods of financial management, exercises originality in developing and establishing standards, procedures and instructions necessary to support the Branch and other involved parties.

- Analyzes Assessment Center results data for all program participants and identifying trends, and developing material on e.g., financial management issues, regulatory guidance matters, and program changes for dissemination to the program participants.
- Explores non-HUD sources of technical assistant (e.g., non-profits, universities, etc.), and facilitates effective partnership between HUD, residents and management of organizations and entities participating in the Section 8 program.
- Utilizes available computer equipment and data systems to maintain current financial data, track program participant performance trends and compliance issues, and generate appropriate work products.
- Serves as a technical specialist at local, regional, state and other conferences, seminars, workshops, etc., on Section 8 financial management issues and topics with oral and written presentations.
- Directly provides advice and guidance on situations for program participants on unique situations. Also provides advice and guidance on unique cases which have not been previously encountered and for which there are no national procedures or experience.
- Assists in the control, monitoring, sub-assignment and oversight of allocations of Section 8 funding for the Branch.
- Processes special requests, controlled correspondence and other correspondence as assigned. -Provides targeted technical assistance requiring financial analyst expertise. Contacts involve negotiation and persuasion in obtaining the adoption of technical points and methods that are in conflict with desire and opinions of other financial staff.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and skill in applying rules, regulations, statutes pertaining to financial management and funding aspects of all Section 8 subsidy programs. Knowledge of the oversight process in order to effectively analyze and administer financial operations. Knowledge of trends in pertinent Section 8 programs in order to develop realistic intervention strategies and to provide management and staff with information upon which to develop solutions to any significant downward performance trends developing.
- Comprehensive knowledge of the contract and deliverable work products in order to effectively analyze and evaluate contractor performance.
- Ability to apply problem-solving and analytical techniques to extract and analyze financial data from numerous sources to identify problems, make recommendations, etc., on contract administrators, owners or managers nationwide. Comprehensive financial knowledge needed to determine causes of problems in varying areas of the country with numerous external factors involved.
- Knowledge of HUD accounting and financial reporting policies for Section 8 programs.

FACTOR 2 - SUPERVISORY CONTROLS

Assignments are given in general terms via overall Branch goals and objectives, or as a result of trends identified. The incumbent is independently responsible for planning and carrying out assignments by determining, after identifying problem areas, what additional data should be evaluated so that management specialists will have the information they need to administer the programs. Work is reviewed for consistent interpretation of legal precedents, equitable treatment of clients' contractors, impact on HUD policy, and effectiveness in supporting program objectives. The incumbent's expertise is such that recommendations are usually accepted. The incumbent develops deadlines and project requirements through analysis of performance data, coordination with cross-functional teams dealing with specific issues problems, and the needs of the program participants. The incumbent is considered an authority on financial and budget issues related to the Section 8 programs, and is expected to provide expert advisory assistance and exercise judgment in developing solutions to complex problems whether on an individual or as a member of a team.

FACTOR 3 – GUIDELINES

Guidelines include legislative statutes, Departmental regulations and HUD-Section 8 program participant contractual agreements. The incumbent uses judgment in deviating from established methods to obtain information on unusual cases, and analyzes trends to clarify the need for changes to existing guidelines. Incumbent is recognized as an authority on interpretation and development of guidelines.

FACTOR 4 – COMPLEXITY

The duties involve performing complex reviews and analysis of financial documents submitted by program participants. Identifying operational and programmatic deficiencies and providing management and contractors specialists with technical assistance (solutions which have been effective in the past, novel techniques, and programs being used in other locations).

FACTOR 5 - SCOPE AND EFFECT

The work involves receiving and reviewing financial and funding documents and making a determination of their accuracy and completeness. As a result of incumbents' recommendations, the amount and timing of funding to program participants is affected. Work also involves interaction with other program specialists or generalists on cross cutting issues or problems related to the Section 8 programs. Provides advisory services for complex programs. Branches involve significant or controversial issues, dealing with substantial expenditures or major problems. The nature of work in the Branch is of a national scope and impact, dealing with contract administrators, managers or owners, Multifamily Hubs and programs centers, etc.

Senior Financial Analyst (GS-1160-13)

GS-1160-13

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Financial Operations Branch. The incumbent performs under general supervision of the Branch Chief of the Financial Operations Branch.

The Branch is responsible for the review and approval of all Section 8 program financial documents related to assisted housing programs administered by housing agencies (contract administrators) and private entities such as owners and managers. The Branch's mission is to provide timely and accurate rental assistance payments to contract administrators, owners and managers.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent serves as the principal advisor for financial matters relating to the Section 8 programs. Responsibilities include review and approval of the more complex program budgets, reservation and obligation of funds, scheduling of payments, preparation of contracts, review and approval of financial or year-end statements, generation of appropriate financial transactions, interaction with staff in the Field Offices for resolution of audit findings related to the financial management of Section 8 program participants. The incumbent is also responsible for working with lower graded technical staff on the processing, validation and review of data and automated documents submitted to the Branch by Contract Administrators, assisted housing project owners and or agents. Responsibilities also include analyzing data to keep abreast of program compliance and performance operations; serving as a leader of any team to assist in developing appropriate solutions to complex issues and problems identified by either remote monitoring or information provided by the Assessment Center; and providing expert advice and guidance on complex issues.

Incumbent performs the following:

- Performs complex, comprehensive reviews and analysis of financial data reported on various documents such as budgets, requisitions, year-end settlement statements, and voucher assistance payments on a specified geographic or nation-wide basis. Uses information from a variety of systems in making determinations regarding approval of program budgets, financial statements and scheduling of payments. Systems include, but are not limited to, HUDCAPS, TRACS, MTCS and IBS.
- Trains lower graded technical staff on the review and analysis of routine financial data.
- May serve as a Government Technical Monitoring (GTM) as needed for contracts related to the work of the Division. May perform limited or extensive duties at the direction of the Branch Chief. Full GTM duties would involve: serving as primary liaison with the contractor and the responsible Contracting Officer; ensuring appropriate

communication and flow of information; coordinating and monitoring any use of government space and equipment by contractors; participating in pre-award and post-award activities.

- Recommends and implements creative solutions to financial problems and takes an active role in implementing needed changes. Provides expert technical assistance and advice to Field Offices, TARCs, Assessment Center, etc., as necessary on issues relating to the financial management of the Section 8 programs.
- Initiates and participates in team assignments as needed to deal with cross cutting financial management issues. When appropriate, serves as Team Leader for efforts related to Section 8 financial management issues problems, to develop appropriate solutions (which often will be extended nationwide) to extremely complex issues and problems identified by either analysis or data or through contact with Field Office staff or Assessment Center staff. Distributes and balances workload among the team, makes team assignments, concurs in all correspondence related to the team assignment.
- Assists the Branch Chief, or other assigned supervisors staff, in monitoring and evaluating management or performance plan goals, including input and feedback into the development and analysis of diagnostic data. Monitors and tracks accomplishment as assigned and provides input into the Management Plan reports, analyzes reports submitted on shortfalls, clarifies issues, resolves problems relating to goals achievement.
- Assists field office staff in monitoring compliance of all programs participants in the financial area e.g., sufficiency of operating reserves, designated check signatories, adequate timekeeping procedures, applicants employment verification, proper applications of the annual adjustment factor and timely recertification of residents. Works with other financial analyst to identify financial trends and coordinates as necessary with cross-functional experts to develop strategies for dealing with these broad trends.
- Provides technical assistance to assigned program participants by responding to questions, and identifying technical assistance needs and assisting in the development of tailored packages to address those needs using strategies such as peer-to-peer networks and developing accounting systems and cash handling procedures. Plans and conducts training for the assisted housing industry, Hub Field Office staff and other customers on new procedures or policies to be utilized in the transmission of automated program data to the Office.
- Prepares and submits various complex statistical, programmatic and administrative written reports, evaluations, plans and strategies on problems, issues, budgets, training needs assessment, travel and most effective utilization of resources.
- Trains lower graded financial analysts and other HUD staff.
- Participates in meetings for the purpose of assessing and preparing recommendations for improved operations and performance. Applying a thorough and comprehensive knowledge of the policies, laws, regulations, procedures and methods of financial management, exercise originality in developing and establishing standards, procedures and instructions necessary to support the Division and other involved parties.

- Works with lower graded financial analysts in analyzing Assessment Center results data for all program participants and identifying trends, and developing material on financial management issues, regulatory guidance matters, and program changes for dissemination to the program participants.
- Explores non-HUD sources of technical assistant (e.g., non-profits, universities, etc.), and facilitates effective partnership between HUD, residents and management of organizations and entities participating in the Section 8 program.
- Utilizes available computer equipment and data systems to maintain current financial data, track program participant performance trends and compliance issues, and generate appropriate work products.
- Serves as a technical specialist at local, regional, state and other conferences, seminars, workshops, etc., on Section 8 financial management issues and topics with oral and written presentations.
- Directly provides advice and guidance on situations for program participants on unique situations. Also provides advice and guidance on unique cases which have not been previously encountered and for which there are no national procedures or experience.
- Assists in the control, monitoring, sub-assignment and oversight of allocations of Section 8 funding for the Branch.
- Processes special requests, controlled correspondence and other correspondence as assigned. -Provides targeted technical assistance requiring financial analyst expertise. Contacts involve negotiation and persuasion in obtaining the adoption of technical points and methods that are in conflict with desire and opinions of other financial staff.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and skill in applying rules, regulations, statutes pertaining to financial management and funding aspects of all Section 8 subsidy programs. Knowledge of the oversight process in order to effectively analyze and administer financial operations. Knowledge of trends in pertinent Section 8 programs in order to develop realistic intervention strategies and to provide management and staff with information upon which to develop solutions to any significant downward performance trends developing.
- Comprehensive knowledge of the contract and deliverable work products in order to effectively analyze and evaluate contractor performance.
- Ability to apply problem-solving and analytical techniques to extract and analyze financial data from numerous sources to identify problems, make recommendations, etc., on contract administrators, owners or managers nationwide. Comprehensive financial knowledge needed to determine causes of problems in varying areas of the country with numerous external factors involved.
- Knowledge of HUD accounting and financial reporting policies for Section 8 programs.

FACTOR 2 - SUPERVISORY CONTROLS

Assignments are given in general terms via overall Branch goals and objectives, or as a result of trends identified. The incumbent is independently responsible for planning and carrying out assignments by determining, after identifying problem areas, what additional data should be evaluated so that management specialists will have the information they need to administer the programs. Work is reviewed for consistent interpretation of legal precedents, equitable treatment of clients' contractors, impact on HUD policy, and effectiveness in supporting program objectives. The incumbent's expertise is such that recommendations are usually accepted. The incumbent develops deadlines and project requirements through analysis of performance data, coordination with cross-functional teams dealing with specific issues problems, and the needs of the program participants. The incumbent is considered an authority on financial and budget issues related to the Section 8 programs, and is expected to provide expert advisory assistance and exercise judgment in developing solutions to complex problems whether on an individual or as a member of a team.

FACTOR 3 – GUIDELINES

Guidelines include legislative statutes, Departmental regulations and HUD-Section 8 program participant contractual agreements. The incumbent uses judgment in deviating from established methods to obtain information on unusual cases, and analyzes trends to clarify the need for changes to existing guidelines. Incumbent is recognized as an authority on interpretation and development of guidelines.

FACTOR 4 – COMPLEXITY

The duties involve performing complex reviews and analysis of financial documents submitted by program participants. Identifying operational and programmatic deficiencies and providing management and contractors specialists with technical assistance (solutions which have been effective in the past, novel techniques, and programs being used in other locations).

FACTOR 5 - SCOPE AND EFFECT

The work involves receiving and reviewing financial and funding documents and making a determination of their accuracy and completeness. As a result of incumbents' recommendations, the amount and timing of funding to program participants is affected. Work also involves interaction with other program specialists or generalists on cross cutting issues or problems related to the Section 8 programs. Provides advisory services for complex programs. Branches involve significant or controversial issues, dealing with substantial expenditures or major problems. The nature of work in the Branch is of a national scope and impact, dealing with contract administrators, managers or owners, Multifamily Hubs and programs centers, etc.

Senior Financial Analyst (GS-1160-14)

GS-1160-14

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Assisted Housing Oversight (Rental Assistance Contracts) Division and Financial Operations Branch. The incumbent performs under general supervision of the Branch Chief of the Financial Operations Branch.

The Branch is responsible for the review and approval of all Section 8 program financial documents related to assisted housing programs administered by housing agencies (contract administrators) and private entities such as owners and managers. The Branch's mission is to provide timely and accurate rental assistance payments to contract administrators, owners and managers.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent serves as the principal advisor for financial matters relating to the Section 8 programs. Responsibilities include review and approval of the more complex program budgets, reservation and obligation of funds, scheduling of payments, preparation of contracts, review and approval of financial or year-end statements, generation of appropriate financial transactions, interaction with staff in the Field Offices for resolution of audit findings related to the financial management of Section 8 program participants. The incumbent is also responsible for working with lower graded technical staff on the processing, validation and review of data and automated documents submitted to the Branch by Contract Administrators, assisted housing project owners and or agents. Responsibilities also include analyzing data to keep abreast of program compliance and performance operations; serving as a leader of any team to assist in developing appropriate solutions to complex issues and problems identified by either remote monitoring or information provided by the Assessment Center; and providing expert advice and guidance on complex issues.

Incumbent performs the following:

- Performs complex, comprehensive reviews and analysis of financial data reported on various documents such as budgets, requisitions, year-end settlement statements, and voucher assistance payments on a specified geographic or nation-wide basis. Uses information from a variety of systems in making determinations regarding approval of program budgets, financial statements and scheduling of payments. Systems include, but are not limited to, HUDCAPS, TRACS, MTCS and IBS.
- Trains lower graded technical staff on the review and analysis of routine financial data.
- May serve as a Government Technical Monitoring (GTM) as needed for contracts related to the work of the Division. May perform limited or extensive duties at the direction of the Branch Chief. Full GTM duties would involve: serving as primary liaison with the contractor and the responsible Contracting Officer; ensuring appropriate

communication and flow of information; coordinating and monitoring any use of government space and equipment by contractors; participating in pre-award and post-award activities.

- Recommends and implements creative solutions to financial problems and takes an active role in implementing needed changes. Provides expert technical assistance and advice to Field Offices, TARCs, Assessment Center, etc., as necessary on issues relating to the financial management of the Section 8 programs.
- Initiates and participates in team assignments as needed to deal with cross cutting financial management issues. When appropriate, serves as Team Leader for efforts related to Section 8 financial management issues problems, to develop appropriate solutions (which often will be extended nationwide) to extremely complex issues and problems identified by either analysis or data or through contact with Field Office staff or Assessment Center staff. Distributes and balances workload among the team, makes team assignments, concurs in all correspondence related to the team assignment.
- Assists the Branch Chief, or other assigned supervisors staff, in monitoring and evaluating management or performance plan goals, including input and feedback into the development and analysis of diagnostic data. Monitors and tracks accomplishment as assigned and provides input into the Management Plan reports, analyzes reports submitted on shortfalls, clarifies issues, resolves problems relating to goals achievement.
- Assists field office staff in monitoring compliance of all programs participants in the financial area e.g., sufficiency of operating reserves, designated check signatories, adequate timekeeping procedures, applicants employment verification, proper applications of the annual adjustment factor and timely recertification of residents. Works with other financial analyst to identify financial trends and coordinates as necessary with cross-functional experts to develop strategies for dealing with these broad trends.
- Provides technical assistance to assigned program participants by responding to questions, and identifying technical assistance needs and assisting in the development of tailored packages to address those needs using strategies such as peer-to-peer networks and developing accounting systems and cash handling procedures. Plans and conducts training for the assisted housing industry, Hub Field Office staff and other customers on new procedures or policies to be utilized in the transmission of automated program data to the Office.
- Prepares and submits various complex statistical, programmatic and administrative written reports, evaluations, plans and strategies on problems, issues, budgets, training needs assessment, travel and most effective utilization of resources.
- Trains lower graded financial analysts and other HUD staff.
- Participates in meetings for the purpose of assessing and preparing recommendations for improved operations and performance. Applying a thorough and comprehensive knowledge of the policies, laws, regulations, procedures and methods of financial management, exercise originality in developing and establishing standards, procedures and instructions necessary to support the Division and other involved parties.

- Works with lower graded financial analysts in analyzing Assessment Center results data for all program participants and identifying trends, and developing material on financial management issues, regulatory guidance matters, and program changes for dissemination to the program participants.
- Explores non-HUD sources of technical assistant (e.g., non-profits, universities, etc.), and facilitates effective partnership between HUD, residents and management of organizations and entities participating in the Section 8 program.
- Utilizes available computer equipment and data systems to maintain current financial data, track program participant performance trends and compliance issues, and generate appropriate work products.
- Serves as a technical specialist at local, regional, state and other conferences, seminars, workshops, etc., on Section 8 financial management issues and topics with oral and written presentations.
- Directly provides advice and guidance on situations for program participants on unique situations. Also provides advice and guidance on unique cases which have not been previously encountered and for which there are no national procedures or experience.
- Assists in the control, monitoring, sub-assignment and oversight of allocations of Section 8 funding for the Branch.
- Processes special requests, controlled correspondence and other correspondence as assigned. -Provides targeted technical assistance requiring financial analyst expertise. Contacts involve negotiation and persuasion in obtaining the adoption of technical points and methods that are in conflict with desire and opinions of other financial staff.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and skill in applying rules, regulations, statutes pertaining to financial management and funding aspects of all Section 8 subsidy programs. Knowledge of the oversight process in order to effectively analyze and administer financial operations. Knowledge of trends in pertinent Section 8 programs in order to develop realistic intervention strategies and to provide management and staff with information upon which to develop solutions to any significant downward performance trends developing.
- Comprehensive knowledge of the contract and deliverable work products in order to effectively analyze and evaluate contractor performance.
- Ability to apply problem-solving and analytical techniques to extract and analyze financial data from numerous sources to identify problems, make recommendations, etc., on contract administrators, owners or managers nationwide. Comprehensive financial knowledge needed to determine causes of problems in varying areas of the country with numerous external factors involved.
- Knowledge of HUD accounting and financial reporting policies for Section 8 programs.

FACTOR 2 - SUPERVISORY CONTROLS

Assignments are given in general terms via overall Branch goals and objectives, or as a result of trends identified. The incumbent is independently responsible for planning and carrying out assignments by determining, after identifying problem areas, what additional data should be evaluated so that management specialists will have the information they need to administer the programs. Work is reviewed for consistent interpretation of legal precedents, equitable treatment of clients' contractors, impact on HUD policy, and effectiveness in supporting program objectives. The incumbent's expertise is such that recommendations are usually accepted. The incumbent develops deadlines and project requirements through analysis of performance data, coordination with cross-functional teams dealing with specific issues problems, and the needs of the program participants. The incumbent is considered an authority on financial and budget issues related to the Section 8 programs, and is expected to provide expert advisory assistance and exercise judgment in developing solutions to complex problems whether on an individual or as a member of a team.

FACTOR 3 – GUIDELINES

Guidelines include legislative statutes, Departmental regulations and HUD-Section 8 program participant contractual agreements. The incumbent uses judgment in deviating from established methods to obtain information on unusual cases, and analyzes trends to clarify the need for changes to existing guidelines. Incumbent is recognized as an authority on interpretation and development of guidelines.

FACTOR 4 – COMPLEXITY

The duties involve performing complex reviews and analysis of financial documents submitted by program participants. Identifying operational and programmatic deficiencies and providing management and contractors specialists with technical assistance (solutions which have been effective in the past, novel techniques, and programs being used in other locations).

FACTOR 5 - SCOPE AND EFFECT

The work involves receiving and reviewing financial and funding documents and making a determination of their accuracy and completeness. As a result of incumbents' recommendations, the amount and timing of funding to program participants is affected. Work also involves interaction with other program specialists or generalists on cross cutting issues or problems related to the Section 8 programs. Provides advisory services for complex programs. Branches involve significant or controversial issues, dealing with substantial expenditures or major problems. The nature of work in the Branch is of a national scope and impact, dealing with contract administrators, managers or owners, Multifamily Hubs and programs centers, etc.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with employees in the Branch, Division, Multifamily Hubs and Program Centers, etc.

Business Relationships, Contracts & Grants Division

Business Relationships Analyst

GS-1101-09/12

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Business Relationships, Contracts, & Grants Division. The incumbent serves as a Headquarters level analyst for the Division having knowledge on unique issues involving the Division and Multifamily Housing, researching policy and issues in accordance with direction from senior staff, addressing needs from field staff nationwide, reviewing and providing analysis on the development of policy or procedures in response to regulatory and statutory changes; working on teams for ad-hoc special projects impacting the Office of Asset Management & Portfolio Oversight. The Division coordinates the business relationships between Multifamily Housing and other HUD organizations. The Division is the primary liaison with the Real Estate Assessment Center (REAC), the Departmental Enforcement Center (DEC), and other Offices. The Division works with these organizations and others to assure that the Office of Housing and the affiliated organizations achieve the goals of the Department. The Division is responsible for the development and maintenance of operating protocols and Memoranda of Understanding between Multifamily Housing and external organizations. The Division also performs ad-hoc projects and special initiatives as needed by the Office of Housing.

MAJOR DUTIES AND RESPONSIBILITIES

The Business Relationships Analyst serves as a researcher and analyst on various subjects for the Division. As such, he/she will be required to perform various daily functions, have the ability to change responsibilities as needed, and be available to research and work on various tasks involving the Division and the Office of Multifamily Housing. The Business Relationships Analyst's duties include a wide range of activities related to project management, data analysis, and complex research. The incumbent's duties include (but are not limited to):

- Addressing Multifamily Hub needs as directed by Business Relationships Specialists who act as liaisons for the Hub.
- Providing support to Business Relationships Specialists as they work with REAC to ensure property inspections are scheduled and performed in a timely manner and annual audited financial statements are submitted on time.
- Serving as a Headquarters point of contact on a variety of complex topics involving the Division.
- Working under the direction of Supervisory staff of the Division in projects involving the Office of Housing and the Real Estate Assessment Center (REAC). Including researching

subject matter on developing policy recommendations and reviewing changes which may affect the financial and physical assessment of FHA properties by REAC.

- Working under the direction of Managers of Business in projects involving the Office of Housing and the Departmental Enforcement Center (DEC). Including researching subject matter developing policy and reviewing changes for referral of FHA properties and clients for enforcement by the DEC.
- Serving as team member for ad-hoc projects.
- Providing research and analysis to senior staff on policy issues and decisions facing the division.
- Assisting senior staff in the analysis and development policy decisions affecting the physical and financial analysis of Multifamily properties reviewed by REAC.
- Serving as a Government Technical Monitor on various contracts for the Office of Asset Management & Portfolio Oversight.
- Drafting documents and serving on nominating panels for new contracts. Originating correspondence to inquiries from lenders, industry, field offices, member of Congress.
- Researching and drafting memoranda on complex issues as directed by senior staff. Along with general duties, the Business Relationships Analyst will also work on teams handling special initiatives that will adjust and change as the Division develops. Some examples of the Business Relationships Analysts' duties on these teams include:
 - Collecting and reviewing Stand Alone Use Agreements.
 - Tracking and recording the monitoring and response to audits performed by the Office of Inspector General to the Office of Multifamily Asset Management.
 - Providing research to senior staff and drafting memoranda during renegotiation of longstanding Multifamily contracts to ensure maximum cost effectiveness.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of Office of Housing program, procedures, and policies.
- Knowledge of a wide range of administrative laws, policies, regulations, and precedents applicable to the administration of Housing's programs.

- Knowledge of HUD's program goals and objectives, the sequence and timing of key program events, milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within HUD.
- Expert Knowledge of Microsoft Office.
- Extensive experience in research and analysis.

FACTOR 2 - SUPERVISORY CONTROLS

The Business Relationships Analyst will be supervised by a Supervisory Business Relationships Specialist. The employee will be delegated various duties by senior staff members and assigned ongoing responsibility to projects as needed for the division. The employee will be expected to serve on teams where he/she will be overseen by team leaders. As experience progresses, the employee may serve as a team leader, overseeing junior staff members.

Work is typically performed in an adequately lighted and climate controlled office. The work may also require occasional travel and moderate risks and discomforts associate with visiting multifamily property sites.

FACTOR 3 - GUIDELINES

Guidelines consist of HUD policies, handbooks, standards, and a general outline of the concepts, methods, and program goals. The employee uses judgment and discretion in determining intent, and in interpreting and revising existing policy and regulatory guidance for use by others within or outside the employing organization.

FACTOR 4 - COMPLEXITY

The work consists of highly complex projects and studies. Typical assignments require reviewing and researching complex subjects, providing data and analysis in a prescribed format, and developing draft papers, memos, and correspondence as directed by senior staff.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide research and support on major projects and subjects involving the division and Multifamily Housing. This may involve, for example, the performance of long-range program plans, goals, objectives, and milestones, or to evaluating the effectiveness of programs conducted throughout HUD. Typical of work products prepared by employees at this level are in-depth research papers, well drafted memoranda, and complete studies on unique issues which upon implementation would significantly change major administrative aspects of missions and programs, or substantially affect the quality and quantity of benefits and services provided to HUD's clients.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with managers and staff within HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contacts is to foster relationships with outside partners, develop initiatives, collect information, explain policies and procedures, influence managers to accept and implement recommendations, and to influence compliance with established Departmental standards. The incumbent must have the ability to establish rapport with contacts and to encourage them to undertake a certain course of action.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effort may be required.

FACTOR 9 - WORK ENVIRONMENT

Work is typically performed in an adequately lighted and climate controlled office. The work may also require occasional travel and moderate risks and discomforts associate with visiting multifamily property sites.

DRAFT

Business Relationships Specialist

GS-1101-13

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Business Relationships, Contracts, & Grants Division. The Business Relationships Specialist serves as a Headquarters level specialist for the Division acting as a primary liaison for the Division and staff members of other offices, researching and developing policy in accordance with senior staff, developing and fostering outside business contacts, addressing needs from field staff nationwide, developing policy or procedures in response to statutory changes, and working on teams for ad-hoc special projects impacting the Office of Asset Management & Portfolio Oversight. The Division coordinates the business relationships between Multifamily Housing and other HUD organizations. The Division is the primary liaison with the Real Estate Assessment Center (REAC), the Departmental Enforcement Center (DEC), and other Offices. The Division works with these organizations and others to assure that the Office of Housing and the affiliated organizations achieve the goals of the Department. The Division is responsible for the development and maintenance of operating protocols and Memoranda of Understanding between Multifamily Housing and external organizations. The Division also performs ad-hoc projects and special initiatives of programs as needed by the Office of Housing.

MAJOR DUTIES AND RESPONSIBILITIES

The Business Relationships Specialist serves as a specialist on various subject matters and serves as a liaison for the Division. As such, he/she will be required to perform various daily functions, with the ability to change responsibilities as needed; serve as an expert on various topics involving the Division and the Office of Multifamily Housing. The Business Relationships Specialist's duties include a wide range of duties related to project management and business relationships addressed by the Division as well as providing advice and guidance to field staff and other HUD offices. The incumbents duties include (but are not limited to):

- Acting as a liaison for assigned Hubs in the referral of Compliance, Disposition and Enforcement plans to the Office of Asset Management & Portfolio Oversight, responding to congressional inquiries involving property reviews, answering questions about REAC inspections, and addressing any other issues/requests which involve BR.
- Serving as a subject matter expert on a variety of complex topics involving the Division.
- Maintaining business and inter-agency contacts which work with the Office of Asset Management & Portfolio Oversight.
- Working under the direction of Managers of Business in projects involving the Office of Housing and the Real Estate Assessment Center (REAC). Including developing policy

recommendations and reviewing changes which may affect the financial and physical assessment of FHA properties by REAC.

- Working under the direction of Managers of Business in projects involving the Office of Housing and the Departmental Enforcement Center (DEC). Including developing policy and reviewing changes for referral of FHA properties and clients for enforcement by the DEC.
- Serving as team member for ad-hoc projects.
- Providing research and advice to Managers of Business in preparation of guidance to the Division Director and Office Director on changes in policy and procedure for interagency relationships between the Division and other Offices.
- Attending and participating monthly and quarterly meetings with DEC, REAC, and other interagency partners.
- Providing written advice and recommendations to senior staff on policy issues and decisions facing the division.
- Assisting senior staff in the analysis and development policy decisions affecting the physical and financial analysis of multifamily properties reviewed by REAC.
- Serving as a Government Technical Monitor on important contracts for the Office of Asset Management & Portfolio Oversight.
- Drafting documents and serving on nominating panels for new contracts.
- Originating correspondence to inquiries from lenders, industry, field offices, member of Congress.
- Drafting memoranda directed to the Division Director or Office Director suggesting changes, updates, or developments to the Office of Asset Management & Portfolio Oversight.
- Along with general duties, the Business Specialist will also work on special initiatives requiring a high level of experience and expertise that will adjust and change as the Division develops. Some examples of these duties include:
- Working on a team responsible for reviewing and enforcing violations of Stand Alone Use Agreements.

- Assisting in the monitoring and response to audits performed by the Office of Inspector General to the Office of Asset Management & Portfolio Oversight.
- Assisting Managers of Business Relationships in renegotiating longstanding Multifamily contracts to ensure maximum cost effectiveness.
- Researching and providing written guidance on the effectiveness of scanning and imaging all documents housed within the Office of Multifamily Housing.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of the application of a wide range of qualitative and or quantitative methods for the assessment and improvement of program effectiveness or the improvement of complex management processes and systems.
- Expert knowledge of Office of Housing program, procedures, and policies.
- Expert knowledge of a wide range of administrative laws, policies, regulations, and precedents applicable to the administration of Housing's programs.
- Knowledge of HUD's program goals and objectives, the sequence and timing of key program events, milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within HUD.
- Experience working with other HUD Offices, outside governmental agencies, and industry partners.

FACTOR 2 - SUPERVISORY CONTROLS

The Business Specialist will have low-level supervision, referring most matters and consulting with Supervisors of Business Relationships in the performance of their daily duties. The employee may be delegated responsibility and authority to plan, schedule, and carry out projects at the discretion of senior staff. The employee will be expected to serve on teams where he will be overseen by team leaders. As experience progresses, the employee may serve as a team leader, overseeing junior staff members.

FACTOR 3 - GUIDELINES

Guidelines consist of HUD policies, handbooks, standards, and a general outline of the concepts, methods, and program goals. The employee uses judgment and discretion in determining intent, and in interpreting and revising existing policy and regulatory guidance for use by others within or outside the employing organization.

Incumbent is recognized as very knowledgeable in the development and or interpretation of guidance on program planning and evaluation in their area of specialization.

FACTOR 4 - COMPLEXITY

The work consists of highly complex projects and studies, which require expert level analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of the program, and or developing criteria for evaluating the effectiveness of the program. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or to evaluating the effectiveness of programs conducted throughout HUD. Employee may develop new ways to resolve major administrative problems, plan the most significant administrative management aspects of programs, develop administrative regulations or guidelines for the conduct of program operations, or develop new criteria for measuring program and the extent to which program goals and objectives are attained.

Findings and recommendations of major significance to top HUD management officials, and often serve as the basis for new administrative systems, legislation, regulations, or programs. Typical of work products prepared by employees at this level are complete decision packages, staff studies, and recommendations which upon implementation would significantly change major administrative aspects of missions and programs, or substantially affect the quality and quantity of benefits and services provided to HUD's clients.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with managers and staff within HUD, interagency leaders, and individuals and groups from outside HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contacts is to foster relationships with outside partners, develop initiatives, collect information, explain policies and procedures, influence managers to accept and implement recommendations, and to influence compliance with established Departmental standards. The incumbent must have the ability to establish rapport with contacts and to encourage them to undertake a certain course of action.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effort may be required.

FACTOR 9 - WORK ENVIRONMENT

Work is typically performed in an adequately lighted and climate controlled office. The work may also require occasional travel and moderate risks and discomforts associate with visiting multifamily property sites.

DRAFT

Director

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Multifamily Oversight, Office of Asset Management & Portfolio Oversight's Business Relationships, Contracts, & Grants Division. The incumbent serves as Director of the Division, overseeing staff, ensuring continued working relationships with outside offices, and adjusting the Division as needed. The Division coordinates the business relationships between Multifamily Housing and other HUD organizations. The Division is the primary liaison with the Real Estate Assessment Center (REAC), the Departmental Enforcement Center (DEC), and other Offices. The Division works with these organizations and others to assure that the Office of Housing and the affiliated organizations achieve the goals of the Department. The Division is responsible for the development and maintenance of operating protocols and Memoranda of Understanding between Multifamily Housing and external organizations. The Division also performs ad-hoc projects and special initiatives as needed by the Office of Housing.

The incumbent oversees the management of Supervisors in the Business Relationships Divisions and other staff who are skilled in the functions performed by the Division. He/she performs supervisory and managerial duties to assure that the Division meets established goals and objectives.

MAJOR DUTIES AND RESPONSIBILITIES

The Director is responsible for overseeing all activities of the Division. In this capacity, he/she will make policy decisions which have a direct impact on the division and provide recommendations to the Director for the Office of Asset Management & Portfolio Oversight for policy changes affecting Multifamily Housing. The Director will oversee and delegate new projects and duties as they enter BR, and adjust staff members' responsibilities as needed. The Director serves as the primary point of contact with interagency representatives and outside industry partners working with the Division. The Director's responsibilities include (but are not limited to):

- Implementing and completing ad-hoc projects at the request of the Office Director and other senior staff.
- Overseeing the relationships between Housing and the Real Estate Assessment Center (REAC) and the Departmental Enforcement Center (DEC).
- Directing the development of new projects and initiatives to achieve the goals and mission of the Division.
- Developing and managing ongoing relationships with leaders of outside offices and divisions that work with Multifamily Housing.

- Serving as the principal advisor to the Office Director regarding REAC, DEC, interoffice contacts, industry contacts, and special projects housed within the Division.
- Providing services and activities to other Divisions and Offices within Multifamily Housing which falls under the Division's goal to work with outside agency partners.
- Evaluating the effectiveness of policies and procedures developed or implemented by the Division, and develops recommendations for improvement.
- Resolving issues between outside industry partners and Hub Directors which escalate to headquarters level.
- Keeping the Office Director apprised of ongoing developments within the Division.
- Planning of work to be accomplished by the staff of the Division, including establishing goals, priorities, and schedules for work completion.
- Guiding, instructing, advising, and counseling staff members on work assignments, standards, and expectations.
- Evaluating the performance of the Division's staff.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of Office of Housing program, procedures, and policies.
- Expert knowledge of a wide range of administrative laws, policies, regulations, and precedents applicable to the administration of Housing's programs.
- Extensive leadership experience.
- Ability to supervise and manage experienced high level employees.
- Knowledge of HUD's program goals and objectives, the sequence and timing of key program events, milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within HUD.

- Extensive contacts with HUD officials and outside industry partners.

FACTOR 2 – ORGANIZATIONAL SETTING

The incumbent is under the supervision of the Deputy Director of the Office of Multifamily Oversight, who reviews the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 – SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The Director exercises full managerial responsibility for all employees in the Division. As Director, the incumbent assures implementation of the goals and objectives of the Office by planning work to be accomplished, setting and adjusting short and long-term work priorities, and preparing and reviewing work schedules. The incumbent determines areas of emphasis, approaches, and initiates methods to increase work quality of office. There are significant responsibilities when it comes to dealing with officials of other units or organizations; making decisions on non-routine, costly or controversial issues and requests; examining and resolving group grievances or serious employee complaints; reviewing and approving serious disciplinary actions; recommending selections for subordinate positions for coordinating the work of others, and similar positions; approving expenses comparable to within-grade increases, extensive overtime, and employee travel; recommending awards of bonuses for non-supervisory personnel and changes in position classification; subject to approval by higher level officials, supervisors, or others; finding and implementing ways to eliminate or reduce significant barriers to production, promote team building, or improve business practices.

FACTOR 4 – PERSONAL CONTACTS

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

FACTOR 5 – PURPOSE OF CONTACTS

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 6 - PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effort may be required.

Management Analyst (GS-0343-9/11)

GS-0343-9/11

INTRODUCTION

This incumbent performs analysis and advisory assignments related to the effectiveness of government programs and or the efficiency of the management of government operations.

MAJOR DUTIES AND RESPONSIBILITIES

Conducts detailed analyses of complex functions and work processes of broad administrative or technical programs and makes recommendations for improvement in the effectiveness and efficiency of work operations. Develops new methods, organizational structures and management processes. Counsels and advises program managers on methods and procedures, management surveys, management reports, and control techniques.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of Federal and agency regulations; knowledge of the specific organization's programs and missions; as well as knowledge of pertinent laws, regulations, and policies related to program operations area to consider their impact on programs.
- Knowledge of qualitative and quantitative techniques for measuring effectiveness, efficiency, and productivity of assigned programs.
- Skill in applying analytical and evaluative methods and techniques in developing of new procedures and approaches to identify and resolve significant issues and problems of a unique nature.
- Ability to communicate effectively to make recommendations to management and brief them.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides limited direction, setting the overall project objectives. The supervisor, in consultation with the incumbent, develops deadlines and project plans. The incumbent is responsible for independently performing assignments and keeping the supervisor apprised of potentially controversial issues. Completed work is reviewed for effectiveness in meeting organizational goals and overall feasibility.

FACTOR 3 - GUIDELINES

Guidelines consist of broadly stated mission objectives and Federal regulations. The incumbent conducts extensive analysis and interpretation in applying the provisions of the numerous and complex guidelines. Independent research is conducted to determine the applicability of the guidelines for many unique and difficult assignments and modify them accordingly.

FACTOR 4 - COMPLEXITY

The work involves duties requiring different processes and methods. These include the in-depth analysis of program requirements, budgetary constraints, regulatory limitations, and agency policy. The incumbent makes decisions regarding the design of plans and assesses circumstances and data available. The incumbent makes decisions, interprets considerable data, plans the work, and refines the methods and techniques to be used.

FACTOR 5 - SCOPE AND EFFECT

The incumbent is responsible for all phases of assignments. The work has a major impact on the efficiency and effectiveness of operations that contributes to overall productivity of the organization. The work involves studies of administrative and managerial processes and procedures to assess and subsequently refine the productivity, effectiveness, and efficiency of program operations. The issues involved may cross-organizational lines or geographical areas. The studies performed could affect the administrative methods of the managerial processes of the organization.

FACTORS 6 AND 7 - PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts include employees and top managers within the organization, as well as managers at various levels within private industry. Contacts occur through meetings, at which the incumbent presents proposals or issues for negotiation. Contacts are for negotiation and consultation, as well as to provide information of a technical nature. The incumbent develops approaches to reach a mutual understanding of a situation.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a typical office setting.

Management Analyst (GS-343-12/13)

GS-343-12/13

INTRODUCTION

This is a standard position description which may be used in any of the Housing organizations. The Office of the Assistant Secretary for Housing-Federal Housing Commissioner is responsible for developing, implementing, and maintaining the mortgage insurance and multifamily and single family housing programs and related functions for production, financing, and management of such housing and the conservation and rehabilitation of housing stock or related regulatory functions.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent provides program support and assistance in the analysis and development of policy, legislation and research and performs the following specific functions:

- Researches and investigates new or improved business and management practices for application to Housing programs and operations.
- Identifies data required for use in the management and direction of programs.
- Develops management plans, procedures, and methodology;
- Conducts complex and special studies for efficiency and productivity and recommends changes or improvements in work methods, and procedures.
- Develops procedures and systems for establishing, operating, and assessing the effectiveness of administrative control systems.
- Analyzes and evaluates Housing functions and activities being considered for conversion to contract operations.
- Identifies resources (funding, equipment, facilities) required to support varied level of program operations.
- Reviews administrative audits and investigative reports to recommend appropriate changes or corrective action required.
- Defines, plans, develops, and implements controls and procedures for the organizations in Headquarters and the Field structures.
- Performs extensive and in-depth reviews for a more efficient and effective mission and function.

- May serve as a team leader or member in developing and/or implementing improvements to the mission function of the organization in its Headquarters and Field structure.
- Develops and implements management procedures and policies in Housing Headquarters and its Field structure.
- Conducts special cost benefits analyses, studies, reports, surveys, inquiries, and evaluations.
- Prepares oral and written reports and presentations; prepares graphs and charts that present clear, concise, and effective analytical results of, evaluations and studies performed; provides staff level with formal presentations.
- Prepares replies to inquiries from Members of Congress, other Government agencies, Field Offices, Contractors, and the general public on very complex and substantive questions relating to Housing's operations and management.
- Represents the office, as needed, in meetings, workshops and conferences.
- This position may have access to sensitive HUD systems at the supervisor's discretion and as identified in the Management Survey. Draft responses to correspondence assigned to the office.
- Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert Knowledge and mastery of the application of a wide range of qualitative or quantitative methods for assessing and improving effectiveness.
- Expert knowledge of the range of administrative laws, policies, regulations, and precedents applicable to the Housing's programs.
- Expert knowledge of Housing's program goals and objectives, the sequence and timing of key program events and milestones, and methods of evaluating the worth of program accomplishments.
- Expert knowledge of relationships with other programs and key administrative support functions within Housing.

- Expert knowledge of the organizational structure, functions and procedures of Housing, and their relationships with the other program areas of the Department.
- Expert knowledge and ability to design and conduct comprehensive management studies of housing programs.
- Expert knowledge and ability to assemble and analyze relevant facts and draw significant conclusions.
- Expert knowledge and skill in presenting accurate findings and the ability to make feasible and responsive recommendations both orally and in writing. These recommendations may require negotiations with management to accept extensive changes in established procedures or they may involve substantial resources.
- Expert knowledge and skill in the use of computers.

FACTOR 2 - SUPERVISORY CONTROLS

Within a framework of priorities, funding and overall project objectives, the employee and Supervisor develop a mutually acceptable project plan. The employee is responsible for planning and organizing the study, estimating costs, coordinating with staff and line management personnel, and conducting all phases of the project. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, clarity of presentation, soundness of conclusions and effectiveness in achieving intended objectives.

FACTOR 3 - GUIDELINES

The incumbent is guided by oral instructions; laws decisions, rules and regulation governing Housing and related programs; overall HUD management policies; and standard management principles and practices. The existing studies and policies must often be revised to accomplish the project goals. Within the context of broad regulatory guidelines the employee may refine or develop more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness and productivity in the administration of operating programs.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies, which require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of a specific Housing program, and or developing criteria for evaluating its effectiveness. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services. Assignments are further complicated by: the need to deal with subjective concepts such as value judgments; the quality and quantity of actions are measurable primarily in predictive terms; and findings and conclusions are highly subjective and not readily susceptible to verification through replication of study methods or reevaluation of results. Options, recommendations, and conclusions developed by the employee take into account and give appropriate weight to uncertainties about the data and other variables, which affect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs and to ensure that the Secretary and Assistant Secretary receive timely, accurate and complete data and project information for use in conjunction with out-of-town travel, meeting, speeches and other events. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or evaluating the effectiveness of programs. The work involves identifying and developing ways to resolve problems or cope with issues, which directly affect the accomplishment of principal program goals and objectives. The work involves assisting in establishing criteria for assessing program effectiveness; reviewing, investigating and analyzing a variety of unusual conditions. Work also ensures that Housing's policies, legislation and research programs are consistent with Housing programs and Departmental priorities and that their impacts are fully described and understood.

Study reports typically contain findings and recommendations of major significance to HUD's top management, and often serve as the basis for new administrative systems, legislation, regulations, or programs. The end product of the incumbent affects the internal operations of HUD, HUD's interaction with other entities in the housing field, and the operation of housing programs by other housing-related government agencies.

FACTORS 6 AND 7 - PERSONAL CONTACTS AND PURPOSE OF CONTACTS

Contacts within the Department are primarily for the purpose of obtaining program or project-related data and information and for exchanging views on Housing policies, legislation and research, which affect various Housing programs. Contacts are made to assist in planning, coordination, providing advice to resolve operating problems, and to influence managers or other officials to accept and implement findings and recommendations on organizational improvement or program effectiveness. Incumbent may encounter resistance due to such issues as organizational conflict, competing objectives, or resource problems.

FACTOR 8 - PHYSICAL DEMANDS

The work involves some walking, standing and carrying of documents. Some exposure to weather conditions is involved when traveling in the performance of duties.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a normal office environment.

May require occasional travel.

DRAFT

Program Analyst (GS-343-9/11)

GS-343-9/11

INTRODUCTION

This position is located in the Business Relationships, Contracts & Grants Division (Grants Team) within the Deputy Assistant Secretary of Multifamily Housing's Office of Asset Management & Portfolio Oversight. The incumbent of this position serves as a program analyst, responsible for functions relating to the review and analysis of multifamily housing programs and policies and the development of basic plans, policies and legislative proposals. The incumbent is responsible for being sufficiently knowledgeable about all of the policy issues concerning multifamily housing to perform assignments concerning them competently. At any point in time, the incumbent is also a staff expert on policy issue areas of major concern to the Director of the Office of Asset Management & Portfolio and the Deputy Assistant Secretary. Generally, the incumbent is responsible for performing assignments of moderate complexity in the issue areas for which he/she is assigned special responsibility.

In carrying out his/her other assignments, the incumbent has latitude to interact and negotiate with staff in other offices at the Office of Asset Management & Portfolio Oversight level or lower. He/she serves as a Multifamily representative on any inter-HUD or inter-agency task force groups consisting of staff at these levels.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's specific duties follow:

- Analyzes programs and policy options and develops options papers and policy proposals, particularly with regard to economic;
- Analyzes new or proposed program policies and their impact on current overall Multifamily housing policies;
- Develops program designs to implement new programs and policies authorized by Congress for which organizational responsibility has not been assigned;
- Develops legislative proposals and coordinates development of legislative proposals by program offices;
- Reviews and analyzes legislative proposals and their impact on existing programs;
- Prepares testimony for appearances of program officials before Congressional committees; prepares briefing materials for these officials and explanatory materials for use by Congressional committees in relation to proposed legislation;
- Develops proposals concerning regulations for the use of the Office of General Counsel in issue areas for which the incumbent has special responsibility; tracks and expedites the development of regulations elsewhere in the Office of Multifamily Housing;
- Coordinates with and assists the Office of Policy Development and Research in program effectiveness evaluations;
- In coordination with the Office of Policy Development and Research, recommends and develops research programs in issue areas for which the incumbent is assigned special

responsibility; negotiates with this office regarding funding and implementation of these proposals;

- In coordination with the Office of Policy Development and Research, monitors research contracts in the areas for which the incumbent is assigned special responsibility and the results of such research;
- In coordination with the Office of Policy Development and Research, prepares policy proposals that are based on the results of research; and
- Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge and skill in applying the basic principles, practices, and methods of program analysis to determine whether policies and program designs are in conformance with Congressional intent and overall Administration policy.
- Knowledge of legislative, regulatory and policy issues concerning Multifamily Housing and their relation to overall housing policies in order to develop policy options and proposals.
- Knowledge of organization, programs, missions, and functions of the Office of Multifamily Housing in order to evaluate and recommend ways to improve the organization's effectiveness and efficiency.
- Knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness and efficiency of Multifamily Housing programs.
- Knowledge of automated systems and their application to the program analysis field and program analysis ability to analyze quantitative data and prepare technical reports, analyses and guidance. -Skill in preparing policy papers and staff reports and skill in delivering briefings to managers to encourage acceptance of findings and recommendations in complex technical areas.
- Skill in interpreting and applying complex legislative, policy and regulatory decisions to develop policies and guidance.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides limited direction, setting the overall project objectives. The supervisor, in consultation with the incumbent, develops deadlines and project plans. The incumbent is responsible for independently performing assignments and keeping the supervisor apprised of potentially controversial issues. Completed work is reviewed for effectiveness in meeting organizational goals and overall feasibility.

FACTOR 3 - GUIDELINES

Guidelines consist of standard Federal regulations and organizational directives. Procedural guidelines are not always applicable to specific project assignments; therefore, the incumbent must use judgment in selecting or adapting guides.

FACTOR 4 - COMPLEXITY

The incumbent is assigned projects that require gathering information, identifying and analyzing issues, and developing recommendations to resolve substantive problems of program effectiveness and efficiency. Studies often require qualitative and quantitative analytical techniques, which frequently require adjustments to fit a wider range of variables (e.g., socio-economic consequences and impact on long-range organizational goals and objectives). In some instances, the incumbent must develop data, which is currently unavailable about program effectiveness or efficiency, and the impact of policies on multifamily housing constituent groups. The incumbent prepares and advises managers on the preparation of detailed policy options and legislative proposals for various multifamily housing programs. Work involves the consideration of legal and regulatory constraints, budgetary constraints, and alternative means of accomplishing policy and program objectives. Work frequently involves making decisions and recommendations concerning complex policy options under conditions of high uncertainty and time pressure.

FACTOR 5 - SCOPE AND EFFECT

The work involves studies of administrative and managerial processes and procedures to assess productivity, effectiveness, and efficiency of program operations. The studies may involve one or several organizations and may affect the administrative methods of the organization, managerial processes, or the operating unit within the organization. The incumbent analyzes results and makes recommendations regarding studies of work processes and procedures. The incumbent applies the fundamental principles, practices, and procedures of program analysis to assess the effectiveness and efficiency of multifamily housing programs and to recommend policy and or legislative changes to enhance program performance. The tasks performed constitute a segment of the broader and more complex assignments of higher-graded co-workers within the Office. The incumbent provides advice and guidance to program staff on issues of program effectiveness and efficiency, and effectiveness of multifamily housing programs at all levels of program implementation.

FACTORS 6 AND 7 - PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts are with employees, supervisors, and managers throughout the organization. Some contacts are with consultants, contractors or managers at the agency level. Contacts are for the purpose of gathering information to facilitate studies being conducted or exchanging information and discussing issues and options available. There may be some degree of controversy involved in the process of influencing others to accept ideas.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, requiring no special physical demands.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a typical office setting.

Program Analyst (GS-343-12/13)

GS-343-12/13

INTRODUCTION

This position is located in the Business Relationships, Contracts & Grants Division (Grants Team), Office of Asset Management & Portfolio Oversight. The incumbent of this position serves as a Program Analyst responsible for providing advice and assistance in the formulation and development of basic plans and policies for the Office of Multifamily Housing Programs; for the revision of program objectives and policies within the Office of Multifamily Asset Management & Portfolio Oversight; for evaluations of multifamily housing programs effectiveness; and for the review, evaluation, and development of major legislative and regulatory proposals which impact the programs within the Office of the Deputy Assistant Secretary for Multifamily Housing Programs.

The Program Analyst is responsible for being sufficiently expert in all of the functions and processes of major concern to the Deputy Assistant Secretary to handle complex assignments. The incumbent is responsible for maintaining a continuing expertise in some of these issue areas. Policy development often involves several phases, both legislative and regulatory, that must be coordinated with the Assistant Secretary, other policy officials in the Office of Multifamily Housing, the rest of HUD, other Federal departments, and the multifamily housing industry.

The incumbent works independently to plan, design and carry out policy development and analysis and his (her) recommendations often serve as the basis for new national policies or legislation. The incumbent defines and analyzes issues to determine the extent of a problem and the best method of resolution. The work may entail continuing efforts over a period of time to establish new policy directions and to deal with persistent problems in the development, management, or rehabilitation of multifamily housing or problems in other areas of the Assistant Secretary's purview. At the request of the Director or the Deputy Assistant Secretary for Multifamily Housing Programs, the incumbent represents the Office of Housing at meetings within the Department and with multifamily housing industry leaders. At these meetings, the incumbent may be called upon to represent the Office's position on controversial issues. The persons contacted in such meetings and in the normal course of work typically have diverse viewpoints, goals, or objectives requiring the employee to achieve a common understanding of the problem. The incumbent makes recommendations about these difficult problems which are technically authoritative, subject to review by the Office and Division Director or Deputy Assistant Secretary as to conformance with general policies.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's specific duties and responsibilities follow:

- Conducts economic and financial analyses of regulatory and statutory proposals, initiatives, and multifamily housing financing proposals submitted for review by outside parties, including use of statistical models to estimate impact of alternative financing

scenarios, and evaluation of project-based management and accounting methods and principles.

- In coordination with the Office of Policy Development and Research (PDR), recommends and develops research programs, and negotiates with PDR regarding funding and implementation of these proposals; the incumbent may also serve as MFH Government Technical Monitor on research evaluation contracts or task orders, as appropriate.
- Coordinates with PDR in program effectiveness evaluations, and prepares policy proposals that are based on the results of those evaluations.
- Reviews and analyzes legislative proposals based on the Department's overall goals and program needs to ensure that there is no negative impact of such legislation on existing multifamily housing policies or legislation. Develops legislative proposals and coordinates their development by program offices.
- Prepares and presents written reports or oral narratives to the DAS for Multifamily Housing Programs, program office DASs, and the Assistant Secretary.
- Works directly with other policy officials in the Office Multifamily Housing, and the rest of HUD, in order to resolve complex policy issues of exceptional importance. In addition, works directly for the Office Director or Deputy Assistant Secretary on special assignments and or in support of on-going responsibilities.
- Prepares and delivers narrative reports and recommendations on justifications and section-by-section analyses of legislative proposals and amendments relating to Multifamily Housing programs for Offices within the Department which have coordination roles in legislative matters between the Department and Congress.
- Develops policies, in consultation with the affected Offices, in areas where the issues are not primarily within the jurisdiction of a single program office. This is designed to ensure that all issues including the Office of Multifamily Housing policy within the Office of the Deputy Assistant Secretary are addressed.
- Analyzes program and policy options in the field of Multifamily in coordination with MF program offices and the Office of Policy Development and Research, develops option papers for use in making policy decisions. Such option papers are designed to outline the pros and cons of a series of recommended approaches to resolving an issue, and may include narrative justifications, historical perspective, financial and or economic impact, and a recommended or most favored approach.

- Handles policy issues of major concern to the Office Director and the Deputy Assistant Secretary. Assignments are of the utmost importance and complexity.
- Prepares top quality work products in any of these issue areas. Responsible for maintaining a continuing authoritative expertise in some of these issues areas.
- Develops, in coordination with Office DASs, initial program designs to implement new programs and policies authorized by Congress for which immediate organizational responsibility has not been assigned elsewhere.
- Provides advice, by written reports or orally, on broad aspects of MF Housing operations and on general conditions affecting the operation of programs within the Office of Housing.
- Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert as well as a specialized knowledge of the operations of Government, both in the Executive Branch and the Congress, and of economic and financial issues impacting multifamily housing such as alternative financing methods (loan guarantees, bond financing, etc.).
- Ability to conduct statistical analyses of economic and financial information, and to design and conduct evaluations and make recommendations based on existing program regulations and procedures, based on available program data; the ability to quickly analyze, discuss, and write authoritatively on a variety of complex issues crossing program and departmental lines and requiring an understanding and careful balancing of conflicting interests.
- Ability to negotiate and favorably resolve matters which may be sensitive and have important legal and fiscal implications (the topics handled are sometimes without precedent and require independent research, in-depth study, and novel solutions).
- Expert knowledge and skill in applying the principles, practices, and methods of program analysis to determine whether policies and program designs are in conformance with Congressional intent and overall Administration policy.
- Expert knowledge of legislative, regulatory and policy issues concerning MF Housing and their relation to overall housing policies in order to develop policy options and proposal.

- Expert knowledge of organization, programs, missions, and functions of the Office of MF Housing in order to evaluate and recommend ways to improve the organization's effectiveness and efficiency.
- Expert knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness and efficiency of MF Housing programs.
- Knowledge of automated systems and their application to the program analysis field and program analysis ability to analyze quantitative data and prepare technical reports, analyses and guidance.
- Skill in preparing policy papers and staff reports and skill in delivering briefings to managers to encourage acceptance of findings and recommendations in complex technical areas.
- Skill in interpreting and applying complex legislative, policy and regulatory decisions to develop policies and guidance.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides overall and general direction with assignments in terms of multifamily housing mission requirements. The incumbent works with supervisor in developing goals, tasks, and deadlines; takes the initiative in identifying and assuming responsibility for major assignments; coordinates effort with other concerned parties both within and outside HUD, usually resolving differences without assistance; represents MF Housing to external organizations and individuals, and handles difficult tasks requiring considerable skill and judgment with minimal supervisory involvement; and maintains workflow with minimal involvement of supervisor. Completed projects typically can be sent from the Division with minimal reviews. Tasks involving complex issues with significant policy implications are reviewed for effectiveness in carrying out program and Departmental objectives.

FACTOR 3 - GUIDELINES

The incumbent is responsible for developing MF Housing policies on complex and controversial issues with national scope, which necessitates sound judgment, insight and imagination in resolving unique situations through innovative means. The incumbent is recognized as an authority in a broad range of MF Housing issues, and on statistical analysis and evaluative survey methodologies. In some cases, existing principles must be modified or expanded to deal with changing circumstances. In most instances there are few or no guidelines and the standards must be created. The incumbent must also develop new approaches to address important issues as they arise, foreseeing and avoiding potential problems. Policies and recommendations must be legally correct and promote the Department's goals.

FACTOR 4 - COMPLEXITY

Assignments and issues handled are diverse and numerous, covering any and all MF Housing programs. They are multifaceted and difficult, frequently involving the interaction of programs which were designed as separate entities and do not easily mesh. The issues often involve situations that are at the forefront of public attention; at other times, they are obscure matters whose early resolution can prevent them from becoming wider concerns. This might include, for example, issues involving alternative methods for financing multifamily housing capital needs (bonds, loan guarantees, etc.). A number of the problems encountered are comprehensible only with painstaking effort and are understood only by a limited number of people. Detailed study and careful analysis may be needed in approaching them, and a variety of techniques may have to be applied to resolve them. Novel solutions are needed to most of the problems, and may have to be adaptable to rapidly changing circumstances. Decisions involving what needs to be done always include the exercise of sound judgment.

FACTOR 5 - SCOPE AND EFFECT

Work products are essential to the operation of the MF Housing programs and are used nationally by HUD offices and multifamily stakeholders. The incumbent works in an environment having maximum potential impact on persons served by the MF Housing programs and effect on the major policy directions of the Department.

PROGRAM ANALYST, GRANT MANAGEMENT TEAM (GS-1101-11)

GS-1101-11

INTRODUCTION

This position is located in the Office of Asset & Portfolio Oversight, Field Asset Management Division. The Division is responsible for directing and overseeing the housing assistance and grant programs administered by the Office of Asset & Portfolio Oversight. These programs include Section 202 and Section 811 capital advance and project rental assistance programs, Service Coordinator and Assisted Living Conversion Programs. The incumbent plans, manages and independently implements grant administration. The duties also include developing policy or procedures in response to statutory changes, identifying problems and or policy changes; developing options and alternatives for upper level management to consider; providing in-depth technical analyses; coordinating findings with other specialists; and preparing reports for and or providing briefings to agency policy makers.

MAJOR DUTIES AND RESPONSIBILITIES

In a developmental capacity, the incumbent performs the following duties with respect to program management and oversight:

- Performs a wide range of duties related to development and implementation of new asset management or grant products, legislation, proposed budget levels, revision of existing programs as well as providing advice and guidance to field staff and the industry.
- Interprets and adapts precedents, develops new or improved approaches to analyze, develop and present information or analyses on nationally important subjects to the field staff.
- Performs brief study assignments including position or option papers on specialized problem areas of a priority nature.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the division.
- Performs reviews and evaluations of field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas there weaknesses are observed.
- Originates correspondence to inquiries from lenders, industry, field offices, members of Congress and individuals which require sophisticated, complex responses.

- Develops technical training and instructional material to assist HUD field personnel.
- Develops technical training and instructional material to assist in accomplishing duties of the Division.
- Serves as a knowledgeable resource for assigned housing programs.
- Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of occupancy and/or grant administration, multifamily systems, asset management policies and procedures, and rent and income issues related to the subsidized programs of the Department.
- Knowledge of field operations pertaining to Multifamily Housing Programs, including the relationship of HUD Offices to local authorities, housing developers, tenants, and various client groups.
- Knowledge of the organization's mission, structure, and organizational relationships.
- Skill in interpreting legal and regulatory requirements related to asset management and occupancy issues, and advising higher level management and Headquarters field staff in resolving problems.
- Skill in developing asset management occupancy policies and procedures for implementation by Headquarters field staff, client groups, and tenant organizations
- Ability in developing and making oral and written presentations to higher level management officials and executives, in order to make recommendations, or clarify policies and procedures.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent is under general supervision of the Supervisory Policy Analyst. The incumbent may also work under the guidance of a Senior Policy Analyst. The incumbent schedules and carries out projects concerned with the analysis and evaluation of housing programs or procedural effectiveness. The incumbent and supervisor develop a mutually acceptable project plan which typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives. Completed work is also reviewed critically

outside the incumbent's immediate office by staff and line management officials whose programs and employees would be affected by implementation of the recommendations.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent consults these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work, are not specific, and deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns. Guidelines require considerable adaptation and or interpretation for application to issues and problem studied. Within the context of broad regulatory guidelines, the incumbent refines or develops more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness in the administration of housing programs.

FACTOR 4 - COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing a specific Housing program or business area and or developing criteria for evaluating the effectiveness of the specific Housing program policies and procedures. Assignments involve different and unrelated processes and methods. This requires reviewing distinctly different types of multifamily housing program regulations and decisions regarding what needs to be done to improve program effectiveness. It also requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation, and conditions and determining a course of action from various alternatives. Successful execution of the tasks is dependent upon the incumbent's ability to plan, coordinate and perform various complex difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analysis of a variety of housing areas to assess aspects of developing program alternatives. Work includes developing program guidance for application to conventional problems and situations in conformance with established criteria. Work contributes to the improvement of productivity, effectiveness, and efficiency in program operations.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other specialists in the Department, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints; and to influence managers officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office.

DRAFT

PROGRAM ANALYST, GRANT MANAGEMENT TEAM (GS-1101-12)

GS-1101-12

INTRODUCTION

This position is located in the Office of Asset & Portfolio Oversight, Field Asset Management Division. The Division is responsible for directing and overseeing the housing assistance and grant programs administered by the Office of Asset & Portfolio Oversight. These programs include Section 202 and Section 811 capital advance and project rental assistance programs, Service Coordinator and Assisted Living Conversion Programs. The incumbent plans, manages and independently implements grant administration. The duties also include developing policy or procedures in response to statutory changes, identifying problems and or policy changes; developing options and alternatives for upper level management to consider; providing in-depth technical analyses; coordinating findings with other specialists; and preparing reports for and or providing briefings to agency policy makers.

MAJOR DUTIES AND RESPONSIBILITIES

- Performs a wide range of duties related to development and implementation of new asset management or grant products, legislation, proposed budget levels, revision of existing programs as well as providing advice and guidance to field staff and the industry. It includes representing the Department with other Federal agencies.
- Interprets and adapts precedents, develops new or improved approaches to analyze, develop and present information or analyses on nationally important subjects to the field staff.
- Performs brief study assignments including position or option papers on specialized problem areas of a priority nature.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the division.
- Performs reviews and evaluations of field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas there weaknesses are observed.
- Serves as expert for assigned housing program.
- Performs other duties as assigned.

- The Policy Analyst is required to provide guidance to HUD field staff in interpreting outstanding policies. The Policy Analyst has extensive contact with key Departmental officials. The incumbent may be required to coordinate the work of other Policy Analysts on an assignment basis, train other Policy Analysts, or perform the function of a Team Leader.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of occupancy and/or grant administration, multifamily systems, asset management policies and procedures, and rent and income issues related to the subsidized programs of the Department.
- Expert knowledge of field operations pertaining to Multifamily Housing Programs, including the relationship of HUD Offices to local authorities, housing developers, tenants, and various client groups.
- Knowledge of the organization's mission, structure, and organizational relationships.
- Skill in interpreting legal and regulatory requirements related to asset management and occupancy issues, and advising higher level management and Headquarters field staff in resolving problems.
- Skill in developing asset management occupancy policies and procedures for implementation by Headquarters field staff, client groups, and tenant organizations
- Ability in developing and making oral and written presentations to higher level management officials and executives, in order to make recommendations, or clarify policies and procedures.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent is under general supervision of the Supervisory Policy Analyst. The incumbent may also work under the guidance of a Senior Policy Analyst. The incumbent schedules and carries out projects concerned with the analysis and evaluation of housing programs or procedural effectiveness. The incumbent and supervisor develop a mutually acceptable project plan which typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives. Completed work is also reviewed critically outside the incumbent's immediate office by staff and line management officials whose programs and employees would be affected by implementation of the recommendations.

FACTOR 3 – GUIDELINES

Standard reference books, HUD manuals, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent consults these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work, are not specific, and deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

Guidelines require considerable adaptation and or interpretation for application to issues and problem studied. Within the context of broad regulatory guidelines, the incumbent refines or develops more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness in the administration of housing programs.

FACTOR 4 - COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing a specific Housing program or business area and or developing criteria for evaluating the effectiveness of the specific Housing program policies and procedures. Assignments involve different and unrelated processes and methods. This requires reviewing distinctly different types of multifamily housing program regulations and decisions regarding what needs to be done to improve program effectiveness. It also requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation, and conditions and determining a course of action from various alternatives. Successful execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate and perform various complex difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analyses of a variety of housing areas to assess aspects of developing program alternatives. Work involves establishing criteria to measure and or predict the attainment of program or organizational goals and objectives. Work may also include developing program guidance for application in varied geographic locations. Work contributes to the improvement of productivity, effectiveness, and efficiency in program operations at different geographical locations within the organization. Work affects the plans, goals, and effectiveness of missions and programs at these various echelons or locations.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other specialists in the Department, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints; and to influence managers officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office.

PROGRAM ANALYST, GRANT MANAGEMENT TEAM (GS-1101-13)

GS-1101-13

INTRODUCTION

This position is located in the Office of Asset & Portfolio Oversight, Field Asset Management Division, Grant Management Team. The Division is responsible for directing and overseeing the housing assistance and grant programs administered by the Office of Asset & Portfolio Oversight. These programs include Section 202 and Section 811 capital advance and project rental assistance programs, Service Coordinator and Assisted Living Conversion Programs. The incumbent plans, manages and independently implements grant administration. The duties also include developing policy or procedures in response to statutory changes, identifying problems and or policy changes; developing options and alternatives for upper level management to consider; providing in-depth technical analyses; coordinating findings with other specialists; and preparing reports for and or providing briefings to agency policy makers.

MAJOR DUTIES AND RESPONSIBILITIES

- Serves as the senior specialist and an authoritative source. As such, he/she may be required to lead others on specific assignments or lead the program team as needed.
- Plans and manages grant administration which is characterized by such features as 1) grant reviews, 2) developing strategies to determine and eliminate improper subsidy payments, 3) evaluating the effectiveness of information technology systems, 4) developing and interpreting policies and procedures in response to statutory changes, and 5) defining and instituting new methods and strategies to improve grant administration.
- Performs a wide range of duties related to development and implementation of new asset management products, legislation, proposed budget levels, revision of existing programs as well as providing advice and guidance to field staff and the industry. It includes representing the Department in negotiations with other Federal agencies.
- Interprets and adapts precedents, develops new or improved approaches to analyze, develop and present authoritative information or analyses on controversial and nationally important subjects to the field staff. These methods and procedures developed serve as precedents for others to follow.
- The Policy Analyst is required to provide authoritative guidance to HUD field staff in interpreting outstanding policies. The Policy Analyst has extensive contact with key Departmental officials. The incumbent may be required to coordinate the work of other Policy Analysts on an assignment basis, train other Policy Analysts, or perform the supervisory function of the Supervisory Policy Analyst in the Supervisory Policy Analyst's absence.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of occupancy and/or grant administration, multifamily systems, asset management policies and procedures, and rent and income issues related to the subsidized programs of the Department.
- Expert knowledge of field operations pertaining to Multifamily Housing Programs, including the relationship of HUD Offices to local authorities, housing developers, tenants, and various client groups.
- Expert knowledge of the organization's mission, structure, and organizational relationships.
- Expert skill in interpreting legal and regulatory requirements related to asset management and occupancy issues, and advising higher level management and Headquarters field staff in resolving problems.
- Expert skill in developing asset management occupancy policies and procedures for implementation by Headquarters field staff, client groups, and tenant organizations
- Expert ability in developing and making oral and written presentations to higher level management officials and executives in order to address controversial issues, make recommendations, or clarify policies and procedures.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides administrative direction in terms of broadly defined missions and functions. The employee operates on a highly independent basis, and undertakes projects that are highly controversial and complex. Generally, due to the technical expertise of employee, the supervisor considers the work performed as technically authoritative and accepts the work product without change. Recommendations are evaluated in terms of funds availability, compliance with program goals, and consistency with national priorities. Extremely complex and highly controversial appraisals are reviewed for their impact on policies, conflicts with legal precedents or requirements.

FACTOR 3 - GUIDELINES

The guides available to the Policy Analyst are HUD policies, handbooks, standards, and a general outline of the concepts, methods, and goals of appraisal programs. In those cases involving complex, controversial, or unusual appraisals, the guides available are of limited value.

FACTOR 4 – COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing a specific Housing program or business area and or developing criteria for evaluating the effectiveness of the specific Housing program policies and procedures. Assignments involve different and unrelated processes and methods. This requires reviewing distinctly different types of multifamily housing program regulations and decisions regarding what needs to be done to improve program effectiveness. It also requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation, and conditions and determining a course of action from various alternatives. Successful execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate and perform various complex difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analyses of a variety of housing areas to assess aspects of developing program alternatives. The work product affects the work of other housing experts and the development of housing programs and policies.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other specialist in the agency, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office.

Program Assistant

GS-303-06

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Business Relationships, Contracts & Grants Division. The incumbent serves as a technical assistant providing administrative support to the Division staff. The Division coordinates the business relationships between Multifamily Housing and other HUD organizations. The Division is the primary liaison with the Real Estate Assessment Center (REAC), the Departmental Enforcement Center (DEC), and other Offices. The Division works with these organizations and others to assure that the Office of Housing and the affiliated organizations achieve the goals of the Department. The Division is responsible for the development and maintenance of operating protocols and Memoranda of Understanding between Multifamily Housing and external organizations. The Division also performs ad-hoc projects and special initiatives of programs as needed by the Office of Housing.

MAJOR DUTIES AND RESPONSIBILITIES

The position requires the performance of a variety of complex duties and interactions with outside business partners. As a member of the Division's staff, the incumbent performs a variety of duties that require an understanding of the responsibilities and duties of the Division, the workload needs of the Division Director and senior staff members, a thorough knowledge of Multifamily Housing Programs, and an expertise in office management and administration. In carrying out the duties of the position, the incumbent must be able to work with and communicate effectively with key Departmental staff, executives of other Federal agencies, members of Congress, and executives from private industry. The incumbent's duties include:

- Coordinates all administrative matters in the immediate office. This includes managing and tracking all incoming and outgoing correspondence, creating and maintaining a filing system to track and manage all documents affecting the Division, managing and disposing of all records kept within the division in compliance with HUD policies, proofreading and editing all documents as directed, preparing all documents as needed for signature and/or concurrence, developing and updating ECase/CTS to track correspondence within the Division, and performing any other administrative functions needed.
- As assigned, performs Ad-Hoc projects as directed by the Director and staff members. This includes researching and gathering background data for use by the Director, Deputy Director, and Supervisors, tracking and logging data on an ongoing basis, working within HUD to collect necessary documents, and overseeing the delivery of documents or sensitive materials to other HUD Offices across the Country or Industry Partners.

- Greets and answers basic questions for clients contacting the Division in person, by telephone or by electronic mail.
- Sets up, tracks, and provides reminders of meetings and appointments for the Division's staff members.
- Fulfills any requests for services or needs of staff members and HUD administrative services. This requires a detailed knowledge of the Department, its protocols and procedures, and services available.
- Assists in special efforts to collect program information and statistical or budget data.
- Provides staff support for formal presentation, briefings, and meetings.
- Prepares weekly, monthly, quarterly, and year-end reports for recurring actions.
- Serves as the control point for Office and Team activities and responsibilities. Establishes and maintains logs and controls to assure timely accomplishment of work and goals, and events such as conferences, staff meetings, industry meetings, etc. Assists staff in follow-up as necessary. -Prepares various program and administrative reports, computer generated reports, charts, and status reports in multifamily projects as needed.
- Oversees filing of projects and program files to ensure completeness and that correspondence and documents are filed in the most efficient manner. Sets up special files as the need arises, such as subject files, etc., so that information is available for status control and preparation of special reports.
- Performs any other related duties as may be assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of the capabilities, operating characteristics, and advanced functions of a variety of types of office automation software, e.g., Microsoft Office, Adobe Acrobat, Lotus, Windows, Microsoft Access.
- Expert Knowledge of standard office administrative functions and duties.
- Expert Knowledge of HUD administrative offices, procedures, and protocols.
- Expert Knowledge of HUD systems and platform programs, e.g. ACRS, CHAMPS, HIHRTS, etc.
- Knowledge of the similarities, differences, and integration of the different software types.

- Thorough knowledge of the Division, Multifamily, Housing and HUD in order to convey instructions to the staff and resolve problems.
- Working knowledge of Federal Housing Administration programs and Housing regulations, directives and handbooks pertaining to the multifamily programs under the Office's jurisdiction, and a familiar knowledge of the Director's or managers view, policies, and special interest. The position also requires a good knowledge of the Departmental organization and administrative procedures.
- Knowledge of the procedures and requirements as they relate to the maintenance of records, preparation of statistical and budget reports, and ability to solve administrative problems.
- Knowledge and ability to identify and obtain research and information on housing and related issues.
- Knowledge of personal computer applications to input data and retrieve appropriate automated reports
- Knowledge and ability to write clear and concise letters or other narrative material. Ability to work under the pressure of meeting due dates or priority requirements.
- A thorough attention to detail and ability to proof read documents to correct any minor grammatical or formatting errors.
- Expert time management skills and ability to consistently meet or exceed deadlines with short notice.

FACTOR 2 - SUPERVISORY CONTROLS

Work is performed under the general supervision of the Division Director. The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines, and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments, including suggested work methods or advice on source material available. The employee uses initiative in carrying out recurring assignments independently without specific instruction and minimal supervision, but refers deviations, problems, and unfamiliar situations not covered by instructions to the supervisor for decision or help. The supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increase with more difficult assignments if the employee has not previously performed similar assignments. As employee learns programs and procedures, the employee is expected to perform more complex and thorough functions with little error and minimal supervision.

FACTOR 3 - GUIDELINES

Guidelines include HUD and Housing regulations, program procedures, manuals, and general regulations of several Federal agencies (OPM, OMB, and Treasury). However, the incumbent frequently must adapt operating procedures to new situations due to frequent program, regulatory, and system changes. In addition, guidelines and agency instructions will be utilized (handbooks, notices, etc.) to keep staff informed of new or changing policies and regulations.

FACTOR 4 - COMPLEXITY

The work principally involves dealing with problems and issues of a procedural nature. The ability to maintain a professional environment and work with senior staff in a professional manner is essential. The incumbent analyzes the issues in the assignment, then selects and applies accepted techniques to the resolution of procedural problems. The incumbent works on a staff, which is involved with HUD's Multifamily Housing programs. The duties often entail shifting frequently from one phase or type of work to another. Incumbent must be able to react responsively and with a positive attitude to rapidly changing requirements and adverse conditions, and adapt methods and procedures to new situations. The incumbent must be able to work under tight deadlines with an attention to detail.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to coordinate administrative matters in the office, resolve various problems and situations that affect the orderly and efficient flow of work, and perform a variety of special assignments. The work involves the execution of specific rules, regulations, or procedures and typically comprises a complete segment of an assignment or project of broader scope. The work product or service affects the accuracy, reliability, or acceptability of further processes or services.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are made by in person visits, electronic messages and by telephone to the office from Federal, State, national, regional and local officials, business organizations, citizens, etc., concerning various aspects of Multifamily Housing. The contacts are with Congressional staff, State and local officials, public interest organizations and private industry. The incumbent also is in contact with program development employees and employees of other areas of HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of contacts is to give and obtain information regarding compliance with established policies and procedures, and to set up appointments and conferences.

FACTOR 8 - PHYSICAL DEMANDS

The work is mostly sedentary; however, the incumbent is required to do some walking, standing, bending, filing, carrying, and packaging for mailing light items such as papers, books, files, etc. Otherwise, the position requires long periods of sitting and working on a personal computer. No special physical demands are required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an office setting. The work area is adequately lighted, heated, and ventilated.

Supervisory Business Relationships Specialist (Branch Chief)

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Business Relationships, Contracts, & Grants Division. The Supervisory Business Relationships Specialist serves as a Headquarters level manager for the Division and reports to the Division Director. The incumbent provides guidance to supervised staff, develops and foster outside business relationships, addressing needs from field staff nationwide, developing policy or procedures in response to statutory changes, and leading teams for special projects impacting the Office of Asset Management and Portfolio Oversight. The Division coordinates the business relationships between Multifamily Housing and other HUD organizations. The Division is the primary liaison with the Real Estate Assessment Center (REAC), the Departmental Enforcement Center (DEC), and other Offices. The Division works with these organizations and others to assure that the Office of Housing and the affiliated organizations achieve the goals of the Department. The Division is responsible for the development and maintenance of operating protocols and Memoranda of Understanding between Multifamily Housing and external organizations. The Division also performs ad-hoc projects and special initiatives as needed by the Office of Housing.

DUTIES AND RESPONSIBILITIES

The Supervisory Business Relationships Specialist serves as the senior specialist and an authoritative source for BRSI on a variety of complex issues. As such, he/she will be required to supervise and guide Analysts and Specialists on specific assignments and supervise the program team as needed. The incumbent's duties include a wide range of responsibilities related to management and oversight of matters covered by the Division as well as providing advice and guidance to field staff and other HUD offices. The incumbent's duties include (but are not limited to):

- Serving as a subject matter expert on a variety of complex topics involving the Division
- Developing and fostering business and interagency contacts which work with the Office of Asset Management & Portfolio Oversight.
- Serving as the primarily liaison for the Office of Housing with the Real Estate Assessment Center (REAC) in developing policy and reviewing changes which may affect the financial and physical assessment of FHA properties by REAC.
- Serving as primary liaison for the Office of Housing with the Departmental Enforcement Center (DEC) in developing policy and reviewing changes for referral of FHA properties and clients for enforcement by the DEC.
- Extensive experience working with other HUD Offices, outside governmental agencies, and industry partners.
- Represents the Office of Asset Management & Portfolio Oversight when necessary, in dealing with key officials and other elements of HUD, other government agencies,

private industry representatives and members of congress with respect to the insurance programs.

- Serving as team-leader for ad-hoc projects.
- Providing advice and guidance to the Division Director and Office Director on changes in policy and procedure for interagency relationships between BRSI and other Offices.
- Scheduling and leading monthly and quarterly meetings with DEC, REAC, and other interagency partners.
- Providing written advice and recommendations to senior management on policy issues and decisions facing the division.
- Analyzing and redeveloping policy decisions affecting the physical and financial analysis of multifamily properties reviewed by REAC.
- Serving as a Government Technical Monitor on high profile, complex contracts for the Office of Asset Management & Portfolio Oversight.
- Negotiating and procuring funds for new contracts.
- Originating correspondence to inquiries from lenders, industry, field offices, member of Congress and individuals, which require sophisticated, complex responses.
- Reviewing and editing correspondence from junior staff members.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the Office.
- Drafting memoranda directed to the Division Director or Office Director suggesting changes, updates, or developments to the Office of Asset Management & Portfolio Oversight.
- Prepares for and makes presentations at industry meetings (e.g., MBA, NLHA)
- Along with general duties, the Supervisory Business Relationships Specialist will also serve as team leader on special initiatives requiring a high level of experience, expertise, and leadership that will adjust and change as the Division develops. Some examples of these duties include:
 - Overseeing a team responsible for reviewing and enforcing violations of Stand Alone Use Agreements.
 - Acting as the Disaster Recovery Expert for the Office of Asset Management & Portfolio Oversight.
 - Reviewing and responding to audits performed by the Office of Inspector General to the Office of Asset Management & Portfolio Oversight.
 - Analyzing and renegotiating longstanding Multifamily contracts to ensure maximum cost effectiveness.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the application of a wide range of qualitative and or quantitative methods for the assessment and improvement of program effectiveness or the improvement of complex management processes and systems.
- Expert knowledge of Office of Housing program, procedures, and policies.
- Expert knowledge of a wide range of administrative laws, policies, regulations, and precedents applicable to the administration of Housing's programs.
- Extensive leadership experience.
- Knowledge of HUD's program goals and objectives, the sequence and timing of key program events, milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within HUD.
- Expert knowledge of analytical and evaluative methods plus a thorough understanding of how regulatory or enforcement programs are administered to select and apply appropriate program evaluation and measurement techniques in determining the extent of compliance with HUD rules and regulations, and in measuring and evaluating program accomplishments. This may include evaluating the content of new or modified legislation for projects impact upon HUD's programs or resources.

FACTOR 2 - SUPERVISORY CONTROLS

As a recognized authority in the analysis and evaluation of programs and issues, the employee is subject to administrative and policy direction concerning overall program priorities and objectives. Supervision is minimal as the employee operates on a highly independent basis, and undertakes projects that are highly controversial and complex. The employee is delegated responsibility and authority to plan, schedule, and carry out major projects by the Director of Business Relationships and other senior staff. Recommendations are evaluated in terms of funds availability, compliance with program goals and consistency with national priorities. The employee is expected to supervise and provide guidance to junior staff.

FACTOR 3 - GUIDELINES

Guidelines consist of HUD policies, handbooks, standards, and a general outline of the concepts, methods, and program goals. The employee uses judgment and discretion in determining intent, and in interpreting and revising existing policy and regulatory guidance for use by others within or outside the employing organization.

Incumbent is recognized as an expert in the development and or interpretation of guidance on program planning and evaluation in their area of specialization.

FACTOR 4 - COMPLEXITY

The work consists of highly complex projects and studies, which require expert level analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of the program, and or developing criteria for evaluating the effectiveness of the program. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services. Options, recommendations, and conclusions developed by the employee take into account and give appropriate weight to uncertainties about the data and other variables, which affect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or to evaluating the effectiveness of programs conducted throughout HUD. Employee may develop new ways to resolve major administrative problems, plan the most significant administrative management aspects of programs, develop administrative regulations or guidelines for the conduct of program operations, or develop new criteria for measuring program and the extent to which program goals and objectives are attained. Findings and recommendations of major significance to top HUD management officials, and often serve as the basis for new administrative systems, legislation, regulations, or programs. Typical of work products prepared by employees at this level are complete decision packages, staff studies, and recommendations which upon implementation would significantly change major administrative aspects of missions and programs, or substantially affect the quality and quantity of benefits and services provided to HUD's clients.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with managers and staff within HUD, interagency leaders, and individuals and groups from outside HUD.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contacts is to foster relationships with outside partners, develop initiatives, collect information, explain policies and procedures, influence managers to accept and implement recommendations, and to influence compliance with established Departmental standards. The incumbent must have the ability to establish rapport with contacts and to encourage them to undertake a certain course of action.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effort may be required.

Field Asset Management & Program Administration Division

Account Executive (A)

GS-1101-9/11

INTRODUCTION

The incumbent of the position is located in the Field Asset Management & Program Administration Division in the Office of Asset Management & Portfolio Oversight. In order to fulfill the roles and responsibilities of this position, the incumbent will need substantive and practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based and other rental assistance programs. While acting as a representative of HUD, the Division and the Office of Asset Management & Portfolio Oversight, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas. This position reports to the Supervisory Account Executive in the Division. The incumbent will provide technical assistance to the Multifamily Hubs/Program Centers in carrying out the duties and responsibilities of the Department.

MAJOR DUTIES AND RESPONSIBILITIES

- Understand new developments in the market place that could have a potential impact on the business and look for opportunities to enhance our business practices to adapt to market changes. Provide recommendations to the Senior Account Executive on how to adjust the business strategy to adapt to changing market conditions.
- Provide lenders and stakeholders with excellent customer service.
- Ensure that all policies and procedures are properly observed, all transactions are conducted with authorized personnel, all records and contracts are complete and up to date, and all customer position limits/risk tolerances are observed.
- Participate in team discussions, prepare management reports, represent the Department in internal discussions with key stakeholders, and provide lender profiles/summaries on an “as needed” basis.
- Responsible for all loan level and deal level credit decision making. Works with development staff to provide input on new loan applications including information about market conditions, management agent and owner.
- Contribute to portfolio surveillance:
- Review and analyze property-level financial statements and rent rolls according to prescribed schedules.
- Review of operating budgets/rent levels on rent controlled properties including any subsidized assets in the assigned portfolio..
- Participate in monthly review of the Watchlist assets. Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Senior Account Executive and Supervisory Account Executive.

- Monitor/communicate any potential operational risk to the Senior Account Executive.
- Review borrower requests related to leases, collateral releases/substitutions, letters of credit, changes in property management, reserve/holdback release, loan extensions and loan modifications, etc. and forward to respective approving official.
- Review loan covenants such as DSCR and Repair Escrows.
- The incumbent is required to integrate sponsor customer requirements and participation into a comprehensive asset development and management plan that is fully coordinated with all contributing organizations including various development disciplines, management agent and owner responsibilities; for control and management of project's construction budget and schedule assuring that HUD's commitment to the sponsor customer are met; and serve as HUD's primary point of contact for sponsor customers and other external agencies on assigned projects.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Provides input to Senior Account Executive on operating budgets related to projects managed.
- Analyzes all financial statements and project operations to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenditures of funds, adequacy of reserves, and insufficient working capital and cash flow. Reports any violations to Senior Account Executive and Supervisory Account Executive and follows through on any referrals made.
- Oversees the assigned subsidized portfolio:
- Works with the PBCA, TCA and their subcontractor when appropriate to insure compliance with HUD requirements
- Process all contractually obligated paperwork for HUD administered contracts including PRAC properties.
- Perform administrative oversight on the TCA and PBCA properties and provide feedback to support staff regarding any noted performance issues.

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and experience in commercial real estate specializing in multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Knowledge of Multifamily subsidy programs i.e. Section 8, PRAC, RAP, Rent Supplement
- Aggregate portfolio management experience.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Account Executive. The Account Executive is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Account Executive. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Development, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his/her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 - WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment. Occasional travel may be required.

DRAFT

Account Executive (B)

GS-1101-9/11

INTRODUCTION

The incumbent of the position is located in the Multifamily Hub/Program Center. In order to fulfill the roles and responsibilities of this position, the incumbent will need substantive and practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based programs. While acting as a representative of HUD and the Multifamily Hub/Program Center, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas. This position reports to the Supervisory Account Executive in the Hub/Program Center.

MAJOR DUTIES AND RESPONSIBILITIES

- Understand new developments in the market place that could have a potential impact on the business and look for opportunities to enhance our business practices to adapt to market changes. Provide recommendations to the Senior Account Executive on how to adjust the business strategy to adapt to changing market conditions.
- Provide lenders and stakeholders with excellent customer service.
- Ensure that all policies and procedures are properly observed, all transactions are conducted with authorized personnel, all records and contracts are complete and up to date, and all customer position limits/risk tolerances are observed.
- Participate in team discussions, prepare management reports, represent the Department in internal discussions with key stakeholders, and provide lender profiles/summaries on an “as needed” basis.
- Responsible for all loan level and deal level credit decision making. Works with Production staff to provide input on new loan applications including information about market conditions, management agent and owner.
- Contribute to portfolio surveillance:
 - Review and analyze property-level financial statements and rent rolls according to prescribed schedules.
 - Review of operating budgets/rent levels on rent controlled properties including any subsidized assets in the assigned portfolio.
 - Participate in monthly review of the Watchlist assets. Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Senior Account Executive and Supervisory Account Executive.
 - Monitor/communicate any potential operational risk to the Senior Account Executive.
- Review borrower requests related to leases, collateral releases/substitutions, letters of credit, changes in property management, reserve/holdback release, loan extensions and

loan modifications, etc. and forward to respective approving official.

- Review loan covenants such as DSCR and Repair Escrows.
- The incumbent is required to integrate sponsor customer requirements and participation into a comprehensive asset production and management plan that is fully coordinated with all contributing organizations including various production disciplines, management agent and owner responsibilities; for control and management of project's construction budget and schedule assuring that HUD's commitment to the sponsor customer are met; and serve as HUD's primary point of contact for sponsor customers and other external agencies on assigned projects.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Provides input to Senior Account Executive on operating budgets related to projects managed.
- Analyzes all financial statements and project operations to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenditures of funds, adequacy of reserves, and insufficient working capital and cash flow. Reports any violations to Senior Account Executive and Supervisory Account Executive and follows through on any referrals made.
- Oversees the assigned subsidized portfolio:
 - Works with the PBCA, TCA and their subcontractor when appropriate to insure compliance with HUD requirements
 - Process all contractually obligated paperwork for HUD administered contracts including PRAC properties.
 - Perform administrative oversight on the TCA and PBCA properties and provide feedback to the CAOM regarding any noted performance issues.
 - Performs Management Reviews on properties in the assigned portfolio based on risk.

FACTOR LEVELS

FACTOR 1--KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and experience in commercial real estate specializing in multifamily housing
- Knowledge of underwriting multifamily mortgage loans
- Knowledge of Multifamily subsidy programs i.e. Section 8, PRAC, RAP, R/S
- Aggregate portfolio management experience.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Project Manager. The Project Manager is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Project Manager. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Production, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his/her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 - WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment.

DRAFT

Account Executive, (Correspondence)

GS-1101-9/11

INTRODUCTION

The incumbent of the position is located in the Field Asset Management & Program Administration Division in the Office of Asset Management & Portfolio Oversight. In order to fulfill the roles and responsibilities of this position, the incumbent will need substantive and practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and the Section 8 Project Based and other rental assistance programs. While acting as a representative of HUD, the Division and the Office of Asset Management & Portfolio Oversight, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas. This position reports to the Supervisory Account Executive in the Division. The incumbent will provide technical assistance to the Multifamily Hubs/Program Centers in carrying out the duties and responsibilities of the Department. In addition to performing the duties and responsibilities, the incumbent will be required to respond to controlled correspondence including but not limited to inquiries from Members of Congress, the White House, Executive Officials and Freedom of Information Requests.

MAJOR DUTIES AND RESPONSIBILITIES

- Understand new developments in the market place that could have a potential impact on the business and look for opportunities to enhance our business practices to adapt to market changes. Provide recommendations to the Senior Account Executive on how to adjust the business strategy to adapt to changing market conditions.
- Provide lenders and stakeholders with excellent customer service.
- Ensure that all policies and procedures are properly observed, all transactions are conducted with authorized personnel, all records and contracts are complete and up to date, and all customer position limits/risk tolerances are observed.
- Participate in team discussions, prepare management reports, represent the Department in internal discussions with key stakeholders, and provide lender profiles/summaries on an “as needed” basis.
- Responsible for all loan level and deal level credit decision making. Works with development staff to provide input on new loan applications including information about market conditions, management agent and owner.
- Contribute to portfolio surveillance:
- Review and analyze property-level financial statements and rent rolls according to prescribed schedules.
- Review of operating budgets/rent levels on rent controlled properties including any subsidized assets in the assigned portfolio..
- Participate in monthly review of the Watchlist assets. Monitor the portfolio for potential or imminent defaults and proactively communicate relevant pre-default information to the Senior Account Executive and Supervisory Account Executive.

- Monitor/communicate any potential operational risk to the Senior Account Executive.
- Review borrower requests related to leases, collateral releases/substitutions, letters of credit, changes in property management, reserve/holdback release, loan extensions and loan modifications, etc. and forward to respective approving official.
- Review loan covenants such as DSCR and Repair Escrows.
- The incumbent is required to integrate sponsor customer requirements and participation into a comprehensive asset development and management plan that is fully coordinated with all contributing organizations including various development disciplines, management agent and owner responsibilities; for control and management of project's construction budget and schedule assuring that HUD's commitment to the sponsor customer are met; and serve as HUD's primary point of contact for sponsor customers and other external agencies on assigned projects.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Provides input to Senior Account Executive on operating budgets related to projects managed.
- Analyzes all financial statements and project operations to determine current financial and physical strengths and weaknesses, and to identify unauthorized expenditures of funds, adequacy of reserves, and insufficient working capital and cash flow. Reports any violations to Senior Account Executive and Supervisory Account Executive and follows through on any referrals made.
- Oversees the assigned subsidized portfolio:
- Works with the PBCA, TCA and their subcontractor when appropriate to insure compliance with HUD requirements
- Process all contractually obligated paperwork for HUD administered contracts including PRAC properties.
- Perform administrative oversight on the TCA and PBCA properties and provide feedback to support staff regarding any noted performance issues.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and experience in commercial real estate specializing in multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Knowledge of Multifamily subsidy programs i.e. Section 8, PRAC, RAP, Rent Supplement
- Aggregate portfolio management experience.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Account Executive. The Account Executive is expected to proceed independently in carrying out the assigned duties within office and branch policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Supervisory Account Executive. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Development, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his/her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 - WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment. Occasional travel may be required.

DRAFT

Director

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Field Asset Management Division. The incumbent serves as the Director of the Field Asset Management & Program Administration Division in the Office of Asset Management. The Division is responsible for managing all communications, both to and from the field, and general issues from the public, related to asset management, including HUD property ownership and management. The Division is responsible for all matters affecting the condition of the property and the related performance of the management for insured, assisted and unassisted multifamily properties. The Division receives and responds to requests for interpretation of policy, waiver of regulations, and property management and ownership issues. The Division responds to issues related to regulated property management or ownership. The Division will support field issues related to financing issues such as bond refunding and prepayment issues, mortgage lockouts and statutory limitations, and property sales as part of a prepayment and refinance transaction.

The incumbent supervises Supervisory Multifamily Oversight Field Asset Management Specialists and other staff who are skilled in the functions performed by the Division. He/she performs supervisory and managerial duties to assure that the Division meets established goals and objectives.

MAJOR DUTIES AND RESPONSIBILITIES

Incumbent is directly responsible for the overall activities of the Division. In this capacity, him/her:

- Defines broad policy objectives of the Division to effectuate legislative, regulatory, and administrative goals, policies, and procedures with respect to the assigned programs.
- Directs the development of criteria, instructions, and guidelines to achieve the goals and mission of the Division.
- Directs the development and implementation of training curricula for use by Headquarters and field staff with respect to the program and operational Jurisdiction of the Division.
- Serves as the principal advisor to the Office Director regarding the programs for which the Division is responsible. Finding and implementing ways to eliminate or reduce significant barriers to production, promote team building, or improve business practices.

FACTORS

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A- Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B- Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

Oversight MF Field Asset Management Analyst (GS-1101-11/12)

GS-1101-11/12

INTRODUCTION

This position is located in the Office of the Deputy Assistant Secretary for Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight, Field Asset Management & Program Administration Division. The Office is responsible for the program management and operations aspects of field support and liaison to the Multifamily Hubs for administrative matters, program performance under the Management Plan and other performance measures under the Government Performance and Results Act (GRPA), data systems, procurement, funding control (programs, grants and contracting funds), training and audits. The Office is also responsible for oversight of the Field Quality Assurance Unit which monitors the underwriting of FHA insured mortgages, approves lenders and risk sharers under various processing and underwriting systems as well as coordinates with the Office of Lender Approval, Inspector General, Comptroller and others for appropriate action relative to matters handled by the Quality Assurance unit.

The Multifamily Oversight Field Asset Management Analyst's duties include a wide range of duties related to management and oversight of matters covered by the office as well as providing advice and guidance to field staff and other HUD offices. It includes representing the Department in negotiations with entities with HUD, other Federal agencies, or others involved in the assigned programs. The Office of Asset Management & Portfolio Oversight develops policy or procedures in response to statutory changes, identified problems or policy changes. The Multifamily Oversight Field Asset Management Analyst provides authoritative guidance to HUD field staff in interpreting outstanding policies relative to responsibilities of the Office. The Multifamily Oversight Field Asset Management Analyst has extensive contact with key Departmental officials and may be required to coordinate the work or train other Multifamily Oversight Field Asset Management Analysts on an assignment basis.

MAJOR DUTIES AND RESPONSIBILITIES

- In a developmental capacity, the incumbent performs the following duties with respect to program management and oversight.
- Prepares and develops major policy, guidelines, procedures, and regulations to provide field offices with guidance on covered areas.
- Resolves individual issues and interprets regulatory and policy issues.
- Prepares for and makes presentations at industry meetings (e.g., MBA, NAHB).
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.

- Originates correspondence to inquiries from lenders, industry, field offices, Members of Congress and individuals which require sophisticated, complex responses.
- Evaluates performance of the Field Quality Assurance Unit relative to lender approval, performance, monitoring, and Mortgagee Review Board review and sanctions or other sanctions in the event of unacceptable performance.
- Develops and makes recommendations on technical issues related to assigned areas and coordinates with appropriate field office or the Quality Assurance Unit responsible for these areas.
- Represents the office in dealing with key officials and other elements of HUD, other government agencies, private industry representatives and members of Congress with respect to the insurance programs.
- Coordinates with the Office of Comptroller, OIG, and Quality Assurance Unit or lender claims, claim rates and volume of lender activity.
- Conducts and directs the development of technical training and instructional material to assist HUD field personnel.
- Conducts and directs the development of technical training and instructional material to assist in accomplishing duties of the Office.
- Serves as a Team Leader when appropriate.
- Performs brief study assignments including position or option papers on specialized problem areas of a priority nature.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the office.
- Performs reviews and evaluations of field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas where weaknesses are observed.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of Office of Multifamily Housing structure, missions, policies, programs, functions and their organizational relationships.
- Knowledge of work and task distribution to improve efficiency of policy and program support operations.
- Knowledge of pertinent laws, regulations, policies and precedents that affect the assigned areas and related support resources.
- Knowledge of analytical and evaluative methods plus a thorough understanding of how regulatory programs are administered so that the selection and application of appropriate evaluation and measurement techniques can be achieved.
- Ability to make formal and informal presentations (both written and oral).

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent is under general supervision of the Supervisory Multifamily Oversight Field Asset Management Specialist. The incumbent may also work under the guidance of a Multifamily Oversight Field Asset Management Specialist. The incumbent schedules and carries out projects concerned with the analysis and evaluation of Multifamily Oversight programs or procedural effectiveness. The incumbent and supervisor develop a mutually acceptable project plan which typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives. Completed work is also reviewed critically outside the incumbent's immediate Office by staff and line management officials whose programs and employees would be affected by implementation of the recommendations.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent consults these reference books. Guidelines require considerable adaptation and or interpretation for application to issues and problem studied. The incumbent uses initiative and resourcefulness in deviating from traditional methods or refining and developing more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness in the administration of housing programs.

FACTOR 4 - COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing a specific Multifamily Oversight program or business area and or developing criteria for evaluating the effectiveness of the specific Multifamily Oversight program policies and procedures. Assignments involve different and unrelated processes and methods. This requires reviewing distinctly difference types of multifamily housing program regulations and decisions regarding

what needs to be done to improve program effectiveness. It also requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation, and conditions and determining a course of action from various alternatives. Successful execution of the tasks are dependent upon the incumbent's ability to plan, coordinate and perform various complex difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analysis of a variety of housing areas to assess aspects of developing program alternatives. Work includes developing program guidance for application to conventional problems and situations in conformance with established criteria. Work contributes to the improvement of productivity, effectiveness, and efficiency in program operations.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other analysts in the Department, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the analyst and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints; and to influence managers and officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office

Oversight MF Field Asset Management Specialist (GS-1101-13)

GS-1101-13

INTRODUCTION

This position is located in the Office of the Deputy Assistant Secretary for Multifamily Oversight. The Office is responsible for the program management and operational aspects of field support and liaison to the Multifamily Hubs for administrative matters, program performance under the Management Plan and other performance measures under the Government Performance and Results Act (GPRA), data systems, procurement, funding control (programs, grants and contracting funds), training and audits. The Office is also responsible for oversight of the Field Quality Assurance Unit which monitors the underwriting of FHA insured mortgages, approves lenders and risk sharers under various processing and underwriting systems as well as coordinates with the Offices of Lender Approval, Inspector General, Comptroller and others for appropriate action relative to matters handled by the Quality Assurance Unit.

MAJOR DUTIES AND RESPONSIBILITIES

The Multifamily Oversight Field Asset Management Specialist's duties include a wide range of duties related to management and oversight of matters covered by the Office as well as providing advice and guidance to field staff and other HUD offices. It includes representing the Department in negotiations with entities within HUD, other Federal agencies, or others involved in the assigned programs. The Multifamily Oversight Field Asset Specialist develops policy or procedures in response to statutory changes, identified problems or policy changes. The Multifamily Oversight Field Asset Specialist provides authoritative guidance to HUD field staff in interpreting outstanding policies relative to responsibilities of the Office. The Multifamily Oversight Field Asset Management Specialist has extensive contact with key Departmental officials and may be required to coordinate the work or train other Multifamily Oversight Field Asset Specialists on an assignment basis.

Incumbent independently performs the following duties with respect to program management and oversight:

- Prepares and develops major policy, guidelines, procedures, and regulations to provide field offices with guidance on covered areas.
- Resolves individual issues and interprets regulatory and policy issues.
- Prepares for and makes presentations at industry meetings (e.g., MBA, NAHB).
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Originates correspondence to inquiries from lenders, industry, field offices, members of Congress and individuals which require sophisticated, complex responses.

- Evaluates performance of the Field Quality Assurance Unit relative to lender approval, performance, monitoring, and Mortgagee Review Board review and sanctions or other sanctions in the event of unacceptable performance.
- Develops and makes recommendations on technical issues related to assigned areas and coordinates with appropriate field office or the Quality Assurance Unit responsible for these areas.
- Represents the office in dealing with key officials and other elements of HUD, other government agencies, private industry representatives and members of Congress with respect to the insurance programs.
- Coordinates with the office of Comptroller, OIG, and Quality Assurance Unit on lender claims, claim rates and volume of lender activity.
- Conducts and directs the development of technical training and instructional material to assist HUD field personnel.
- Conducts and directs the development of technical training and instructional material to assist in accomplishing duties of the Office.
- Serves as a Team Leader when appropriate.
- Performs brief study assignments including position or option papers on specialized problem areas of a priority nature.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the office.
- Performs reviews and evaluations of field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas there weaknesses are observed.
- Serves as expert for assigned housing program.
- Performs other duties as assigned.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of Multifamily Oversight structure, missions, policies, programs, functions and their organizational relationships.
- Expert knowledge of work and task distribution to improve efficiency of policy and program support operations.
- Knowledge of pertinent laws, regulations, policies and precedents that affect the assigned areas and related support resources.
- Knowledge of analytical and evaluative methods plus a thorough understanding of how regulatory programs are administered so that the selection and application of appropriate evaluation and measurement techniques can be achieved.
- Ability to make formal and informal presentations (both written and oral).

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent is under general supervision of the Supervisory Multifamily Oversight Field Asset Management Specialist. The incumbent may also work under the guidance of a Multifamily Oversight Field Asset Management Specialist. The incumbent schedules and carries out projects concerned with the analysis and evaluation of housing programs or procedural effectiveness. The incumbent and supervisor develop a mutually acceptable project plan which typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives. Completed work is also reviewed critically outside the incumbent's immediate office by staff and line management officials whose programs and employees would be affected by implementation of the recommendations.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent consults these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work, are not specific, and deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns. Guidelines require considerable adaptation and or interpretation for application to issues and problem studied. Within the context of broad regulatory guidelines, the incumbent refines or develops more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness in the administration of housing programs.

FACTOR 4 - COMPLEXITY

Typical assignments require developing detailed plans and goals for implementing a specific Housing program or business area and or developing criteria for evaluating the effectiveness of the specific Housing program policies and procedures. Assignments involve different and

unrelated processes and methods. This requires reviewing distinctly different types of Multifamily Oversight program regulations and decisions regarding what needs to be done to improve program effectiveness. It also requires assessing many issues, including pertinent business analysis, regulations, a variety of documentation, and conditions and determining a course of action from various alternatives. Successful execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate and perform various complex difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to provide technical analyses of a variety of housing areas to assess aspects of developing program alternatives. Work involves establishing criteria to measure and or predict the attainment of program or organizational goals and objectives. Work may also include developing program guidance for application in varied geographic locations. Work contributes to the improvement of productivity, effectiveness, and efficiency in program operations at different geographical locations within the organization. Work affects the plans, goals, and effectiveness of missions and programs at these various echelons or locations.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts are with other specialists in the Department, with other professionals within the housing industry, program directors, members of trade associations, etc. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contact is to summarize, interpret, and relate information on policy questions; to present alternative approaches and viewpoints; and to influence managers and officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary accomplished while seated at a desk. No special physical effort is required to perform the work.

FACTOR 9 - WORK ENVIRONMENT

The work environment is that normally found in an office.

SUPERVISORY POLICY ANALYST, GRANT MANAGEMENT TEAM

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, Multifamily Housing Programs, Office of Asset & Portfolio Oversight, Field Asset Management Division. The incumbent serves as Supervisor of the Grant Management Team, Field Asset Management Division. The Team is responsible for the Notifications of Funding Availability and evaluation criteria for all Multifamily Housing grant programs, including Section 202 and 811 Housing Capital and Project Rental Assistance Grants. The Team will also be responsible for grant awards.

The incumbent supervises Policy Analysts and support staff who are skilled in the programs administered by the Team. He/she performs supervisory and managerial duties to assure that the Team meets established goals and objectives.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is directly responsible for the overall activities of the Team. In this capacity, he/she:

- Defines broad policy objectives of the Team to effectuate legislative, Regulatory, and administrative goals, policies, and procedures with respect to the assigned programs.
- Directs the development of criteria, instructions, and guidelines to achieve the goals and mission of the Team.
- Directs the development and implementation of training curricula for use by Headquarters and field staff with respect to the program and operational jurisdiction of the Team.
- Serves as the principal advisor to the Division Director regarding the programs for which the Team is responsible.
- Provides information, advice, and guidance to Congressional representatives, Departmental officials, representatives from other governmental agencies, and other clients regarding programs administered by the Team.
- Coordinates the activities of the Team with those of other Departmental Program areas to assure the accomplishment of overall goals and objectives.
- Evaluates the effectiveness of policies and procedures developed or implemented by the Team, and develops recommendations for improvement where necessary.
- Interprets and provides guidance on established procedures to Headquarters and field staff, representatives from other program areas, non-HUD clients, etc.
- Directs the daily activities of the Team, including:
- Coordinates with other Housing Offices, Divisions and Teams on projects involving the Team's responsibilities;
- Plans work to be accomplished by the staff of the Team, including establishing goals, priorities, and schedules for work completion;

- Guides, instructs, advises, and counsels staff members on work assignments, standards, and expectations;
- Evaluates the performance of the Team staff.

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent supervises the Grant Management Team, which is responsible for the implementation of laws and programmatic changes related to grant policies and disposition through regulations, handbooks, and notices.

Effect: Impacts HUD headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the Nation's population, the nation's housing industry; and receives frequent congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the supervision of the Director of the Field Asset Management Division, a GS-15 one level below the first SES, who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent exercises full managerial responsibility for all employees in the Grant Management Team. As Supervisor, the incumbent assures implementation of the goals and objectives of the Division by planning work to be accomplished, setting and adjusting short and long-term work priorities, and preparing and reviewing work schedules. Determines areas of emphasis, approaches, and initiates methods to increase work quality of office. There are significant responsibilities when it comes to dealing with officials of other units or organizations; making decisions on non-routine, costly or controversial training needs and requests; examining and resolving group grievances or serious employee complaints; reviewing and approving serious disciplinary actions; recommending selections for subordinate positions for coordinating the work of others, and similar positions; approving expenses comparable to within-grade increases, extensive overtime, and employee travel; recommending awards of bonuses for non-supervisory personnel and changes in position classification; subject to approval by higher level officials, supervisors, or others; finding and implementing ways to eliminate or reduce significant barriers to production, promote team building, or improve business practices.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A- Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal

agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B- Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6: OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

Senior Account Executive, (Correspondence)

GS-1101-11/12

INTRODUCTION

The incumbent of the position is located in the Office of Multifamily Housing Programs, Office of Asset Management & Program Administration's Field Asset Management & Program Administration Division and is supervised by the Supervisory Account Executive (Branch Chief). In order to fulfill the roles and responsibilities of this position, the incumbent will need extensive and detailed practical knowledge of a wide range of policies and procedures for the origination and servicing of the FHA multifamily mortgage insurance programs, the Section 202 and 811 Capital Advance programs, and rental assistance programs including Section 8 Project Based, Rent Supplement and Rental Assistance Programs. While acting as a representative of HUD, the Office of Asset Management & Portfolio Oversight and the Field Asset Management & Program Administration Division, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas. The Senior Account Executive will provide technical assistance and guidance to the Multifamily Hubs. In addition to performing the duties and responsibilities, the incumbent will be required to respond to controlled correspondence including but not limited to inquiries from Members of Congress, the White House, Executive Officials and Freedom of Information Requests.

MAJOR DUTIES AND RESPONSIBILITIES

- Understand and evaluate new developments in the market place that could have a potential impact on the business and look for opportunities to enhance HUD's business practices to adapt to market changes. Provide recommendations to management on how to adjust the business strategy to adapt to changing market conditions.
- Provide lenders and stakeholders with excellent customer service.
- Ensure that all policies and procedures are properly observed, all transactions are conducted with authorized personnel, all records and contracts are complete and up to date, and all customer position limits/risk tolerances are observed.
- Lead team discussions, prepare management reports, represent the Department in internal discussions with key stakeholders, and provide lender profiles/summaries on an "as needed" basis.
- Provide guidance and leadership to less experienced members of the team. Must have knowledge of loan level and deal level credit decision making. Works with development staff to provide input on new loan applications including information about market conditions, management agent and owner.
- Provide portfolio surveillance information to various deal stakeholders, as needed.
- Deliver accurate and timely loan and property level information to the various deal stakeholders such as rating agencies, trustees, special servicers, and bondholders.
- Monthly monitoring of the Watchlist.
- When appropriate review field recommendations regarding property re-underwriting to make credit decisions.

- Provide assistance to the Multifamily Hub/PC staff on monitoring of the portfolio for potential or imminent defaults and proactively communicating relevant pre-default information to the Owner/Management Agent and mortgagee.
- Monitor/communicate any potential operational risk to senior management.
- When necessary, review and recommend approval of borrower requests related to leases, collateral releases/substitutions, letters of credit, changes in property management, reserve/holdback release, loan extensions and loan modifications, etc.
- Review loan covenants such as DSCR and Repair Escrows.
- The incumbent formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. The incumbent clarifies published guidelines and explains regulatory requirements.
- The incumbent is considered a senior staff member who personally performs duties involving the most complex cases and develops solutions to issues that could not be assigned to less knowledgeable or less experienced staff. The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- Upon request of the Office of Asset Management & Portfolio Oversight Director or the Division Director, the incumbent performs technical reviews of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Director, Division Director or to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- The incumbent assists in providing on the job training to other Division employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to Division Director or Supervisory Account Executive other formal and informal training needs.
- Upon request, serves as the primary point of contact for projects assigned with sponsor customer, owner/management agent, Federal, State and local government agencies, congressional interests, other external organizations and higher authorities. May be responsible for keeping the sponsor/owner/agent/customer fully informed of project progress, issues and their resolution, and any impacts on costs. When called upon, assures that sponsor customer or other agencies participation in the project is in accordance with the agreed upon management plan maintained, and resolves sponsor customer problems or issues in the most appropriate manner. May be responsible for the development of all required sponsor customer and HUD agreements, leading the negotiation of such agreements on the part of the Department.

- Provides assistance to the Division Director or Director responsible for the transition to Asset Management as it relates to the overall project application development (processing) particularly in cases where there is a phased in or staggered occupancy of buildings, construction activity, closing and final management control, coordination and execution in accordance with HUD's published guidelines and guidance.
- Implements team decisions and guidance, applicable regulations, and policy in the development and oversight of a project.
- As needed, negotiates and integrates all agency functions including underwriting (planning design review, cost engineering, appraisal, credit evaluation and approval) loan closing, construction, start-up and long term management systems and sponsor customer needs of assigned project into a comprehensive procedure within the scope of asset management. Within this plan, integrates schedules and criteria, and establishes the participating parties, assumptions and risks, contingencies, and performance measurement criteria.
- Responsible for maintaining individual project timelines as they relate to the management plan goals. Participates in timeline programming decisions affecting long and short range courses of action for assigned projects.
- Provides input to management on operating budgets related to projects managed by Field staff.
- Oversees the assigned subsidized portfolio: Works with the PBCA, TCA and their subcontractor when appropriate to insure compliance with HUD requirements; process all contractually obligated paperwork for HUD administered contracts including PRAC properties; perform administrative oversight on the TCA and PBCA properties and provide feedback to the CAOM regarding any noted performance issues, as required.
- Reviews and analyzes current and historic financial data; compares previous annual statements with recent financial information; analyzes current operation expenses and project financial data to form the basis of approval or denial of the following actions; rent increases, refinancing, bond refunds, prepayments, modification agreements, transfers of physical assets, changes in the corporate charter and by-laws, substitution of mortgagors, reinstatements of mortgages, budgets submitted by cooperative housing projects, and recommendations for foreclosures. Provides supporting documentation and technical arguments as part of negotiations with legal and financial professionals who act on the project owner's behalf. Review and evaluate legal documents to determine and ensure compliance with Departmental and other federal, state, and local regulations, requirements, statutes, and policies.

FACTOR LEVELS

FACTOR 1 -- KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of and extensive experience in commercial real estate specializing in multifamily housing.
- Knowledge of underwriting multifamily mortgage loans
- Aggregate portfolio management experience.

- Knowledge and experience in federal housing insurance programs, federal housing assistance programs, and other affordable housing programs.
- Strong oral and written communication skills.
- Ability to perform financial analysis on a multifamily property.
- Ability to work with troubled multifamily assets.
- Knowledge of HUD's statutes, regulations, and mortgage servicing policies and procedures relating to various program areas.
- Ability to work independently in making determinations and recommendations to the Troubled Asset Specialist to rectify physical, financial, and ownership problems that cause difficulties at multifamily properties.
- Knowledge of Multifamily subsidy programs such as Section 8, PRAC, RAP, R/S

FACTOR 2 - SUPERVISORY CONTROLS

Incumbent is under the direct supervision of the Supervisory Account Executive. The Account Executive is expected to proceed independently in carrying out the assigned duties within office policy, with completeness and accuracy. Controversial questions, highly sensitive matters and questions requiring a higher level of professional qualifications are referred to the Trouble Asset Specialist. The incumbent's work is not normally checked in process, but periodically reviewed upon completion in terms of overall objectives of HUD policy and handbooks. Assignments may be received on an individual basis or as routine daily work assignments.

FACTOR 3 - GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 - COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. His/her daily and routine actions are based on sound judgment and usually accepted without detailed justification. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for

multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Development, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 - PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

Supervisory MF Oversight Field Asset Management Specialist

GS-1101-14

INTRODUCTION

This position is located under the Deputy Assistant Secretary for Multifamily Oversight. The Office of Asset Management & Portfolio Oversight is responsible for multifamily assets after the development phase, and for policy development regarding the FHA portfolio. The Office is also responsible for the Participation Control function, and is responsible for developing policies for overseeing field operations related to regulated property management, regulated property management, routine mortgage servicing, Default servicing, and acquisition and disposition of loans and properties.

The Supervisory Multifamily Oversight Field Asset Management Specialist serves as a Headquarters level responsible for providing policy analysis to the field staff nationwide. This analysis includes developing policy or procedures in response to statutory changes, identified problems, or policy changes; developing options and, alternatives; providing in-depth technical analyses; coordinating findings with other's; and preparing reports for and or providing briefings to agency policy makers.

MAJOR DUTIES AND RESPONSIBILITIES

The Supervisory Multifamily Oversight Field Asset Management Specialist serves as the senior and an authoritative source. As such, he she will be required to supervise others on specific assignments and supervise one of the program teams in the Field Asset Management & Program Administration Division. The incumbent will perform administrative duties as required by the position.

The Supervisory Multifamily Oversight Field Asset Management Specialist's duties include a wide range of duties related to management and oversight of matters covered by the Office as well as providing advice and guidance to field staff and other HUD offices. It includes representing the Department in negotiations with entities within HUD, other Federal agencies, or others involved in the assigned programs. The incumbent may develop policy or procedures in response to statutory changes, identified problems or policy changes.

The incumbent interprets and adapts precedents, develops new or improved approaches to analyze, develop and present authoritative information or analyses on controversial and nationally important subjects to the field staff. These methods and procedures developed serve as precedents for others to follow. The incumbent is required to provide authoritative guidance to HUD field staff in interpreting outstanding policies relative to responsibilities of the Office. The incumbent has extensive contact with key Departmental officials and will be required to coordinate the work of other Specialists/Analysts on an on-going basis.

SPECIFIC DUTIES:

- Incumbent performs the following duties with respect to program management and oversight:
- Prepares and develops major policy, guidelines, procedures, and regulations to provide field offices with guidance on covered areas
- Resolves individual issues and interprets regulatory and policy issues.
- Prepares for and makes presentations at industry meetings (e.g., MBA, NAHB).
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Prepares contract documents relating to covered areas, which HUD may award contracts for specific actions under the purview of the Office.
- Originates correspondence to inquiries from lenders, industry, field offices, member of Congress and individuals, which require sophisticated, complex responses.
- Evaluates performance of the field relative to lender approval, performance, monitoring, and Mortgagee Review board review and sanctions or other sanctions in the event of unacceptable performance.
- Develops and makes recommendations on technical issues related to assigned areas and coordinating with appropriate field office responsible for these areas.
- Represents the Office when necessary, in dealing with key officials and other elements of HUD, other government agencies, private industry representatives and members of congress with respect to the insurance programs.
- Coordinates with the Office of Comptroller, and OIG on lender claims, claim rates and volume of lender activity.
- Conducts and directs the development of technical training and instructional material to assist HUD field personnel.
- Conducts and directs the development of technical training and instructional material to assist in accomplishing duties of the Office.
- Serves as a Team Leader when appropriate.

- Performs brief study assignments including position or option papers on specialized problem areas of a priority nature.
- Provides liaison with Multifamily Hubs relative to data systems, procurement, funding control, training, audits and other matters covered by the Office.
- Performs reviews and evaluations of field office operations relative to multifamily performance measures to determine degree to which they are achieving their goals and objectives. Determines where improvements are necessary and prepares and reports findings and recommends changes to improve effectiveness in areas where weaknesses are observed.
- Serves as knowledge specialist expert in applicable programs.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the application of a wide range of qualitative and or quantitative methods for the assessment and improvement of program effectiveness or the improvement of complex management processes and systems.
- Expert knowledge of a wide range of administrative laws, policies, regulations, and precedents applicable to the administration of Housing programs.
- Knowledge of HUDLs program goals and objectives, the sequence and timing of key program events and milestones, and methods of evaluating the worth of program accomplishments.
- Knowledge of relationships with other programs and key administrative support functions within HUD.
- Expert knowledge of analytical and evaluative methods plus a thorough understanding of how regulatory or enforcement programs are administered to select and apply appropriate program evaluation and measurement techniques in determining the extent of compliance with HUD rules and regulations, and in measuring and evaluating program accomplishments. This may include evaluating the content of new or modified legislation for projects impact upon HUD's programs or resources.

FACTOR 2 - SUPERVISORY CONTROLS

As a recognized authority in the analysis and evaluation of programs and issues, the employee is subject only to administrative and policy direction concerning overall program priorities and objectives. Employee operates on a highly independent basis, and undertakes projects that are

highly controversial and complex. The employee is delegated complete responsibility and authority to plan, schedule, and carry out major projects. The employee exercises discretion and judgment in determining whether to broaden or narrow the scope of projects or studies. Generally, due to the technical expertise of employee, the supervisor considers the work performed as technically authoritative and accepts the work product without change. Recommendations are evaluated in terms of funds availability, compliance with program goals and consistency with national priorities. Analyses, evaluations, and recommendations developed by the employee are normally reviewed by management officials only for potential influence on broad policy objectives and program goals.

FACTOR 3 - GUIDELINES

Guidelines consist of HUD policies, handbooks, standards, and a general outline of the concepts, methods, and program goals. The employee uses judgment and discretion in determining intent, and in interpreting and revising existing policy and regulatory guidance for use by others within or outside the employing organization. Incumbent is recognized as an expert in the development and or interpretation of guidance on program planning and evaluation in their area of specialization.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies, which require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of the program, and or developing criteria for evaluating the effectiveness of the program. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services. Assignments are further complicated by the need to deal with subjective concepts such as value judgments; the quality and quantity of actions are measurable primarily in predictive terms; and findings and conclusions are highly subjective and not readily susceptible to verification through replication of study methods or reevaluation of results. Options, recommendations, and conclusions developed by the employee take into account and give appropriate weight to uncertainties about the data and other variables, which affect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or to evaluating the effectiveness of programs conducted throughout HUD. The work involves identifying and developing ways to resolve problems or cope with issues, which directly affect the accomplishment of principal program goals and objectives.

Employee may develop new ways to resolve major administrative problems, plan the most significant administrative management aspects of programs, develop administrative regulations

or guidelines for the conduct of program operations, or develop new criteria for measuring program and the extent to which program goals and objectives are attained. Findings and recommendations of major significance to top HUD management officials, and often serve as the basis for new administrative Systems, legislation, regulations, or programs. Typical of work products prepared by employees at this level are complete decision packages, staff studies, and recommendations which upon implementation would significantly change major administrative aspects of missions and programs, or substantially affect the quality and quantity of benefits and services provided to HUD's clients.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with specialists and staff within HUD and with individuals and groups from outside HUD such as private sector appraisers, attorneys, property owners, tax assessors, real estate developers, builders, etc. in a moderately unstructured setting.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contacts is to collect information, explain policies and procedures, influence specialists to accept and implement recommendations, and to influence compliance with established Departmental standards. The incumbent must have the ability to establish rapport with contacts and to encourage them to undertake a certain course of action.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effort may be required.

FACTOR 9 - WORK ENVIRONMENT

Work is typically performed in an adequately lighted and climate controlled office. The work may also require occasional travel and moderate risks and discomforts associate with visiting construction sites.

Multifamily Property Disposition Division

Contracts Specialist

GS-1101-13

INTRODUCTION

The incumbent serves as a Multifamily Contracts Manager in the Office of Asset Management & Portfolio Oversight's Multifamily Property Disposition Division. Incumbent serves as a technical specialist and expert advisor with responsibility for a range of multifamily contracted activities that impact accomplishment of Departmental and Office of Housing mission objectives and maintaining the public trust in Departmental operations. From a geographical standpoint, assignments span all Multifamily Hubs and Program Centers.

From the standpoint of procurement activities, the responsibilities of the incumbent spans from initial planning, through describing procurement needs, market research, proposal evaluation, contract monitoring, performance assessment, and problem resolution. Significant coordination is required with organizational elements within Multifamily Housing and other Departmental components, and among outside entities seeking or doing business with Multifamily Housing.

MAJOR DUTIES AND RESPONSIBILITIES

- Monitors the cost, schedule and performance parameters of all assigned contracts. Functions as an expert technical consultant working with program staff to identify contracting needs to accomplish program mission requirements.
- Periodically reassesses needs for existing contracts in light of shifts in Departmental goals and plans.
- Prepares and coordinates the higher level approval of detailed procurement requests including contract work descriptions, independent cost estimates, proposal instructions, and evaluation criteria. Identifies resources, including staff, funding, equipment, and facilities, for accomplishment of contracted efforts.
- Delegates duties and responsibilities to government technical monitors (GTM) as appropriate.
- Monitors GTM activities and ensures continuity in GTM guidance and evaluation practices among multiple GTMs under a single contract.
- Coordinates the efforts of subject matter experts from other disciplines involved in obtaining quality contracted goods and services.
- Performs a variety of technical management roles.

- Participates in high level meetings as an expert and advisor for briefing top management on procurement plans and contracted activities.
- Evaluates proposals as a member of technical evaluation panels or integrated procurement terms.
- Provides a wide range of specialized oral and written presentations to high level officials and outside parties.
- Serves as technical and program authority on contract negotiation teams.
- Participates in the development of plans for effectively overseeing contracted activities.
- Serves as the primary liaison between contractors and contracting staff. Inspects and evaluates delivered products, including reports in draft and final form, and contractual services.
- Recommends technical acceptance or rejection to contracting officer.
- Prepares substantive written technical assessments of contractor performance.
- Assures proper distribution of final products and other information resulting from contracts.
- Oversees the maintenance of complete technical monitoring files for assigned contracts.
- Provides technical direction and assistance to contractors consistent with contract work descriptions and technical requirements of contracts. Identifies and documents actual and potential contract performance problems.
- Develops a range of alternative solutions to contract problems.
- Teams with contracting staff to resolve performance problems or establish basis for adverse contract actions.
- Reviews contractor payment requests.
- Approves/recommends payments based on delegated authority.
- Monitors contractor use of key personnel.

- Reviews the qualifications of proposed subcontractors and makes recommendations to contracting officer regarding consent to the placement of subcontracts.
- Participates in the conduct of comprehensive studies and analysis of planned, in-progress, and completed contracted efforts for the purpose of obtaining maximum benefit and developing new or improved methods and procedures for accomplishment of program objectives.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of policies and procedures related to the description, evaluation, monitoring, and assessment of contracted products and services.
- Expert knowledge of analytical and evaluative methods, supplemented by a practical knowledge of monitoring techniques, concepts, and practices.
- Ability to plan integrated analytical evaluations of varied control systems and operating programs, select and develop coverage areas, and plan and coordinate team efforts at several sites including the interaction of contractor and agency resources.
- Knowledge of HUD structure, missions, programs, and organizational relationships.
- Ability to use a wide variety of fact finding and monitoring techniques, including task analysis, work measurement, cost estimating, work distribution, statistical analysis, and systems analysis.
- Experience in analyzing proposals, performance methodologies, organizations, program operations, and other areas of management that are characteristically wide in scope, composed of multiple and complex tasks, and pose potential financial and program risks.
- Ability to represent the organization as an analytical expert, within and outside the agency, and to recognize and resolve a variety of different and sometimes unclear problems.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent reports to the Property Disposition Division Director. The Director (supervisor) provides assignments in terms of broad technical requirements. The incumbent is responsible for independently carrying out assignments. Prepares thorough monitoring and accurate analysis of contractor performance. Independently coordinates with subject matter experts and

identifies proposed resolutions for identified problems. Findings and recommendations are normally accepted without significant change. Completed work is reviewed for soundness of overall approach and effectiveness in meeting program objectives.

FACTOR 3 - GUIDELINES

Guidelines are basic Federal, HUD, State and local government regulations; specific program administrative policy statements, regulations, and instructions; Federal and HUD Acquisition Regulations; and HUD procurement policies and procedures. Uses judgment and discretion in determining intent, and in interpreting existing policy and regulatory guidance for use by others within or outside the organization (e.g., other analysts, managers, or contractors). Participates in the development of analysis formats and monitoring techniques for use on a project team, or at subordinate echelons in the organization. Serves as an expert in interpreting contract guidance on program planning and evaluation.

FACTOR 4 - COMPLEXITY

Contracted services, products, and studies require in-depth analysis. Prepares detailed plans, goals, and objectives for implementation and administration of assigned GTR efforts, or develops criteria for evaluating effectiveness of a given contracted effort. Decisions about how to proceed in planning, organizing, and conducting contract monitoring are complicated by conflicting program goals and objectives. Assignments are further complicated by the need to deal with subjective concepts, such as value judgments, quality and quantity of actions measurable in predictive terms, and findings and conclusions that are subjective and not susceptible to verification through replication of study methods or reevaluation of results.

FACTOR 5 - SCOPE AND EFFECT

The work is concerned with analyzing, monitoring, and evaluating technical program aspects of substantive contracted mission-oriented activities. This may involve developing long-range program plans, goals, objectives, and milestones. Evaluates effectiveness of technical aspects of assigned contracted efforts. Identifies and develops ways to resolve problems or cope with issues which directly affect accomplishment of program goals and objectives. Provides authoritative technical advice to HUD and contractor managers.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with agency managers; program subject matter experts; specialists in contracting, financial, legal, information technology, and support functions; and corporate and subject matter managers from private contractors.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts ensure increased contractor efficiency and effectiveness for the purpose of program mission accomplishment. Gathers and exchanges data, explores and resolves complex issues, and coordinates varied technical matters. Discusses and interprets major policies, defends program positions, influences and persuades others concerning high priority HUD objectives, and provides advice and guidance on a broad range of technical issues.

FACTOR 8 - PHYSICAL DEMANDS

Most tasks are performed sitting comfortably. Short deadlines may require working under stress.

FACTOR 9 - WORK ENVIRONMENT

The work involves normal risks or discomforts associated with working in an adequately lighted, heated, and ventilated office.

FACTOR 10 - OTHER FACTORS

The position may require travel to locations other than the primary duty station.

DRAFT

Construction Analyst

GS-0828-13

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Management's Property Disposition Division. Performs a wide variety of work related to assigned reviews and evaluations of architectural, engineering, and administratively related plans and documents including drawings, specifications, bid documents, addenda and change orders which are submitted by applicants for HUD's multifamily housing programs. Reviews architectural and engineering work performed under fee contracts. Serves, and is recognized, as expert with responsibility for ensuring that proposed multifamily program projects, such as Mortgage Insurance and Capital Advances meet HUD requirements. Assignments include projects incorporating complex design features and unusual and advanced building designs, materials and construction techniques. These structures consist of housing for the elderly and disabled, nursing homes, mobile home parks, and high rise apartments. The position requires the services of an expert construction analyst, who is expected to keep abreast of the pertinent industry research and development, and to apply those principles to reduce costs, extend the useful life of projects and to make maximum utilization of available resources.

MAJOR DUTIES AND RESPONSIBILITIES

- The incumbent manages the efficient and effective coordination, and accomplishment of planning, scoping, development design, construction, and operation of major multifamily insured and capital advance projects.
- Applies an extensive knowledge of construction disciplines, development and management concepts, principles, methods and practices. The position requires a broad background and experience in various functions; a full and in depth understanding of HUD Asset Development and Asset Management procedures and guidelines, and government contracting processes.
- The incumbent integrates sponsor customer requirements and participation into a comprehensive asset development and management plan that is fully coordinated with all contributing organizations including various development disciplines, management agent and owner responsibilities; for control and management of project's construction budget and schedule assuring that HUD's commitments to the sponsor customer are met and serves as HUD's primary point of contact for sponsor customers and other external agencies on assigned projects.

The following criteria apply in a review capacity for underwriting administered by the mortgagee and in a full processing and management capacity for underwriting administered by HUD. Asset Management responsibilities remain the full responsibility of HUD.

- Visits project sites to determine conditions of offsite construction or demolition. Evaluates project sites for unusual site conditions such as soil faults, drainage problems, or other design problems that may increase the site development cost or decrease the value of the land. Maintains files on soil classifications, materials, installations, contractors, construction superintendents, and architects so that data gathered will allow faster and more accurate processing.
- Reviews and evaluates the sponsor's housing construction proposals for multifamily projects.
- Selects and evaluates data submitted relevant to the design and construction of the particular project from the architectural and engineering data and prepares the specific documentation required at this stage for project acceptability or rejection.
- Examines existing properties for structural soundness. Determines repairs needed to bring them up to acceptable standards so a determination on feasibility of rehabilitation can be made.
- Reviews the description of proposed housing rehabilitation to ensure it reflects agreements reached at the joint inspection between architect, sponsor, etc. Reviews the economics of demolition weighted against cost of rehabilitation, and reviews the suitability of the rehabilitated project to accommodate needs of its occupants.
- Reviews contract award documents to ascertain if the proposed bid is the lowest or lowest acceptable, consistent with the Owner's Invitation for Bids and bid package and in a amount consistent with the construction budget.
- Reviews contract documents submitted in support of property repair, restoration, or re-development. Reviews and evaluates designs and construction proposal to insure conformance with HUD technical standards and Use Agreement or Deed Requirements. Makes recommendations on acceptability of design and construction proposals. Prepares contract drawings and specifications for initial closing and attends the pre-construction conference.
- Periodically observes construction at the site to evaluate the contractor's and architect's performance; reviews proposed change orders; determines whether the amounts on the contractor's requisition are reasonable; conducts employee wage interviews; reports on Labor and EEO complaints; assures the quality of construction is in accordance with the approved contract documents and assures that required repairs have been done. Records action taken on each site visit on HUD's inspection forms. Takes appropriate action on non-compliance until corrections are completed to the satisfaction of HUD.

- Responsible for monitoring repairs, rehabilitation, redevelopment, compliance with state and local codes, and HUD Physical Condition Standards on post-sale properties; including the monitoring and management of repair escrows (Letter of Credit, Cash Escrow, Performance and Payment Bonds, or Reverter Deeds. Ensures repair escrow is not eliminated or expires prior to all repairs identified in the Use Agreement or Deed have been successfully completed and approved by the Property Disposition Division.
- Incumbent must acquire and maintain certification as a Government Technical Manager (GTM) in order to perform monitoring and contract administration functions related to support the Property Disposition Division receives from contractors.
- Oversees all aspects of the Up-Front Grant (UFG) programs administered by the PD Division. Provides technical advice, training, and recommendations regarding projects to governmental entities and HUD staff in the field and in HQ; communicates with grantees regarding program administration; reviews and approves UFG draws and the subsequent release of UFG funds in the LOCCS system; tracks and reports rehabilitation progress; and, reviews final paperwork and audits to assure program compliance and project completion
- Responsible for respecting the customer, and demonstrating that respect through courteous treatment; directing customers and correspondence to the appropriate party and offering to provide additional assistance; providing quality products through simple communication, following up and reaching out to the client; and providing timely service and results which are monitored by soliciting feedback from customers. Quality customer service is a fundamental responsibility of the position.
- Functions in a "team" environment, offering and providing assistance as necessary and working cooperatively with others in order to complete work assignments and attain goals. Positive and effective teamwork as demonstrated through cooperation and coordination with other staff members is paramount in the effective delivery of HUD programs.
- Performs other duties, as assigned.

NOTE: All HUD personnel will comply with safety regulations, occupational safety and health standards, and other safety directives and orders.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the FHA multifamily mortgage insurance and Section 202 811 programs.

- Knowledge of the multifamily housing mission, structure, and organizational relationships and their inter relationships between the many programs and funding support functions as they are applied within HUD.
- Expert knowledge of both construction practices for housing in order to examine drawings and specifications for compliance with standards; estimate construction costs; alterations; and repair.
- Ability to negotiate the resolution of construction problems or complaints so that the project can be continued.
- Ability to write clear and concise reports to support findings and recommendations.
- Knowledge of the various HUD multifamily housing programs and their philosophies so that both the human and the structural needs are met.
- Knowledge of plans, specifications, and estimates of materials and costs for construction, extensive alterations, and repair of buildings.
- Expert knowledge, skill, and experience in all phases of construction involved in large multifamily dwellings, such as high rise structures, multi-story nursing homes, limited care facilities, special care facilities, and other unique structures included in various Departmental programs.
- Expert knowledge, skill, and experience in properly interpreting construction plans, specifications, soil analysis, and other engineering data.
- Expert knowledge, skill, and experience in applying construction cost estimating principles involving new and substantial rehabilitation construction in the various Departmental programs.
- Knowledge of Federal and State accessibility standards and requirements.
- Ability to make formal and informal presentations; ability to communicate with diverse partners and customers both orally and in writing.
- Ability to work independently and within a team concept.
- The incumbent applies an expert knowledge of HUD multifamily housing programs and construction techniques in performing the duties and in making sound decisions and

judgments on a variety of complex problems. The incumbent applies knowledge, reason and logic to arrive at a reasonable, workable and good decision. Daily and routine actions are based on sound judgment and usually accepted without detailed justification. Decisions regarding what needs to be done include major areas of uncertainty in approach, methodology, or interpretation and evaluation processes that result from such elements as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation between specialists.

FACTOR 5 - SCOPE AND EFFECT

The work involves establishing criteria; formulating projects; assessing program effectiveness; and investigating or analyzing a variety of unusual conditions, problems, or questions. The incumbent manages the construction and repair aspects of the HUD multifamily housing portfolio. The incumbent serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. Services and recommendations emitting from the incumbent are comprehensive and have a direct effect on HUD clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Development, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, non-profits, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 - PURPOSE OF CONTACTS

The purpose of the contacts is to influence the technical and financial accuracy and feasibility of Multifamily Property Disposition projects.

Director, Property Disposition Division

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight's (OAMPO) Property Disposition Division. The incumbent is primarily responsible for the overall direction, management, and supervision of the Property Disposition Division in OAMPO. The incumbent is responsible for all foreclosure, acquisition, management, repair, and disposition activities and strategies for HUD multifamily projects nationwide for both residential and commercial properties, and has broad responsibilities for assuring the management integrity and financial viability of housing projects managed or owned by HUD and the long term stability of the real estate as rental housing. The incumbent regularly interfaces with local officials of varying jurisdictions (Mayors, City Council members, etc.), housing executives, developers, etc. to provide an overview of HUD services and products, and to negotiate complex financial arrangements involving multifamily properties.

MAJOR DUTIES AND RESPONSIBILITIES

To achieve these goals, the incumbent: (1) participates in the development and implementation of HUD policies designed to protect the government's interest in projects and to improve the living conditions of residents; (2) provides subject matter technical expertise, advice and program guidance to contract management agents to improve management operations and resolve project problems; (3) solicits interest in the purchase of properties and negotiates details of sales to State or local government entities or non-profit groups; and (4) negotiates with third parties on HUD's behalf to secure and implement partnerships, agreements and resolution of the entire range of operational, financial, maintenance, occupancy, political and social aspects that may be encountered through HUD's ownership and or management of multifamily properties.

- Supervises professional, technical, and clerical staff who carry out the day-to-day activities associated with the management and sale of HUD-owned and mortgagee-in-possession projects and foreclosures of defaulted loans.
- Determines how to implement the Department's multifamily property disposition program requirements, prioritizes initiatives and sets program direction.
- Assures that supervisors and employees are aware of Multifamily Housing program goals. Solicits the cooperation of and input from staff in the development of goals for the Office of Asset Management & Portfolio Oversight and the Property Disposition Division. Assures that plans and strategies are developed to effectively pursue such goals; negotiates when needed for adjustments due to resource availability, competing objectives, local circumstances, etc. Monitors and evaluates progress and effectiveness in meeting goals; takes corrective actions to facilitate accomplishment of goals.

- Where necessary to meet program goals and objectives, the incumbent secures the services of contractors to assist in providing maximum customer services and quality program delivery. The incumbent actively promotes resident initiatives and community involvement in every aspect of work, where possible and practical.
- Solicits and gains support for the OAMPO's Property Disposition Division, local Multifamily Hubs and Departmental goals through effective communication, orally and written.
- Coordinates delays, unresolved issues and deviations from goals and schedules and the need for appropriate actions immediately to the attention of the local Multifamily Hub Director.
- Reconciles erroneous data printed on automated reports.
- Identifies problems and trends and then assists in developing appropriate corrective strategies and makes recommendations for changes; keeps supervisor informed of such findings for the purpose of assessing their impact on current HUD policies and procedures; resolve problems and issues that hinder the effective operation of the assigned functions or the quality of program accomplishment; eliminates impediments to improve the quality of program assistance. When necessary, confers with the Hub Director for assistance and direction.
- Establishes, implements, and represents multifamily policies in keeping with agency guides both within the Department and outside the Office. Analyzes Division's operational problems and develops timely economical solutions. Develops improvements in, or designs new work methods, conditions and procedures. Assures that property disposition functions (e.g., management, sales, repairs), organizational processes and any other program responsibilities operate in accordance with the current policies and procedures established by the Department.
- Determines the most expeditious and advantageous manner of disposition to reduce the inventory of HUD-owned multifamily properties and the pipeline of projects in foreclosure. Maintains quality control over all assigned functions; responsible for the accuracy and timeliness of all decisions.
- Interprets regulations, policies, and procedures for HUD customers, program intermediaries (both public and private), and the press to further the aims of the National Housing Act and other HUD statutes relevant to the Department's programs and goals.

- Recommends and evaluates policies, standards, and procedures and programs directly affecting national policy and dealing with all phases of the acquired multifamily property activity including foreclosure, acquisition, management and disposition.
- Assures that workload is prioritized and scheduled; assures that demand activities, (i.e., work outside of the office's control that comes in the door) are integrated with controlled work activities and are scheduled or reassigned as appropriate, maintains data systems and automated reporting systems to assure work items can be tracked and analyzed; assures that actions are taken to enhance program results; adjusts operations when necessitated by changing demands and or reduction in resources; assures accurate and timely reporting of operations and activities.
- Determines which property disposition initiatives to support and allocates the limited resources accordingly, including deciding what work is due in-house and what work should be performed by independent contractors.
- Develops and maintains internal management controls to prevent fraud, waste, and mismanagement, and to manage Inspector General and other audit reports.
- Conducts field and office reviews of asset management work activities, e.g., management review, rent increases, etc., to assure consistency in the application of processing procedures, Departmental and field office policies.
- Uses the Property Management System and its successor system as a tool in managing and monitoring the performance of management agents.
- Where necessary, coordinates program objectives, priorities and procedures with appropriate field office staff, e.g., attorneys, economist, FHEO staff, Project Team as well as managing agents, contractors, and residents.
- As appropriate, identifies resource needs (i.e., staff, space, automation and equipment, travel and training) for Property Disposition and provides timely input to the Office of Asset Management & Portfolio Oversight for the consideration and allocation in the Office of Asset Management & Portfolio Oversight's annual budget.
- Prepares and or approves projected workload position studies and recommendations.
- Allocates budget within the Division and ensures economical use of travel and training funds. Assures the conservative use of funds involved in contract services for the Multifamily Property Disposition function, i.e., physical inspections, repairs management, etc.

- Assures that the professional, technical and clerical employees to the Division are assigned to teams and or work assignments (processing, reviews, monitoring, technical assistance, etc.) that are commensurate with staff experience, capabilities, and grade. Within the prescribed policies, procedures, rules and regulations, carries out personnel management activities which affect Division employees, including those activities related to recruitment, selection, assignments, promotions, awards, training, disciplinary action, etc. Establishes performance evaluations. Hears employees' complaints and grievances. Approves/disapproves leave requests. Demonstrates interest in and sensitivity to EEO and the value of diversity and complies with Departmental policy to provide equality of opportunity to all facets of employment.
- The incumbent is responsible for respecting the customer, and demonstrating that respect through courteous treatment; directing customers and correspondence to the appropriate party and offering to provide additional assistance; providing quality products through simple communication, following-up and reaching out to the client; and providing timely service and results which are monitored by soliciting feedback from customers. Quality customer service is a fundamental responsibility of the position.
- The incumbent functions in a team environment, offering and providing assistance as necessary and work cooperatively with others in order to complete work assignments and attain goals.
- Positive and effective teamwork as demonstrated through cooperation and coordination with other staff members is paramount in the effective delivery of HUD programs.
- Performs other duties as assigned.

NOTE: All HUD personnel will comply with safety regulations occupational safety and health standards, and other safety directives and orders.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

The Property Disposition Division oversees all property disposition activities for the Department. . Property disposition decisions made (such as the manner in which a property will be sold) has a significant impact on the local community and the Department's image; hence such as decisions must be weighed carefully by the Division Director before a final disposition strategy is implemented.

The primary purpose of the work is to contribute measurably to achieving Congressional-mandated goals, objectives, and priorities. The responsibilities assigned to this position are for

the purpose of carrying out the statutory and regulatory requirements governing the foreclosure and disposition of HUD assigned properties; the management, foreclosure and disposition of mortgagee-in-possession properties; and the management and disposition of HUD-owned properties.

The incumbent informs the public of potential sales and the procedures to be followed to bid on properties. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on HUD clients. Foreclosure and sale of defaulted properties have a direct impact on the residents living in a project, the immediate neighborhood, and the objectives of the local community in addition to the legal impact of these actions on the mortgagee. Opportunities for place-based solutions are actively sought in partnership with the local community where appropriate and in keeping with the Departments objectives.

FACTOR 2 - I, ORGANIZATIONAL SETTING

The incumbent works under the broad supervision of the Office of Asset Management & Portfolio Oversight Director. The Director receives only general direction and has wide latitude in directing and managing the Property Disposition Program. Performance is reviewed for adherence to regulations, policies, and procedures, and the accomplishment of established goals and objectives. Latitude and flexibility are necessary to carry-out the duties of the work and in resolving problems and issues.

HOUSING PROGRAM ASSISTANT

GS-0303-7

Note: This position is different from Program Assistant (FH0039), which provides more technical programmatic review of application processing.

INTRODUCTION

The incumbent of the position is located in the Office of Asset Management & Portfolio Oversight's Property Disposition Division and is supervised by and responsible to the Director, Property Disposition Division who assigns work in general terms of overall objectives and results desired. The incumbent serves as a technical assistant for providing administrative support to the Property Disposition Division.

MAJOR DUTIES AND RESPONSIBILITIES

- The position requires the performance of a variety of complex duties. The incumbent is knowledgeable of a wide range of policies and procedures for the sale and management of the FHA multifamily property disposition and related programs.
- Receives telephone calls and visitors for the Division Director and staff. Through the incumbent's knowledge of HUD functions and organization, tactfully screens incoming calls and answers questions on complex but non-technical matters or refers them to the appropriate staff member. Recognizes inquiries on matters of policy or technical nature requiring personal attention of the Division Director and keeps the Supervisor informed of all matters which will eventually require a decision. Arranges conferences and meetings, including space, time and staff. Receives and reviews all incoming mail. Types necessary forms on recommended personnel actions for the Division.
- Provides information of HUD Property Disposition procedures in response to telephone calls, letters and personal inquiries. Participates and assists in preparation of correspondence and other documents to be provided to mortgagees, realtors, investors, property owners, officials of State Agencies, Non-Profits and HUD staff. Explains processing procedures and submission requirements for various multifamily housing and property disposition programs (e.g. nature of information required fee structure at various stages of processing, appropriate forms, etc.).
- Controls the flow of correspondence through Property Disposition, tracks correspondence from receipt through signature, and ensures proper mailing. Prepares materials in final form, edits and assembles material, with necessary attachments, routes material for appropriate distribution. Conducts appropriate follow-up
- The incumbent proofreads requests for reservations and Congressional clearances for HUD programs; FOIA requests, deed amendments, and bid kits.

- The incumbent serves as the data base manager for the appropriate Multifamily systems in accordance with system procedures, PD procedures, and handbooks. Monitors the quality of data on a regular basis on behalf of the Division Director to ensure that multifamily management data is accurate, complete, current and timely. Evaluates systems effectiveness and recommends systems improvements to the Division Director. Actively resolves operational problems as necessary.
- Ensures that all system users are aware of system capabilities and that each system is being used to its maximum potential. Provides training when needed.
- Designs and implements alternatives or improved formats for organizing information and for the most effective means of information retrieval.
- The Program Assistant serves as the control point for Division activities and responsibilities. Establishes and maintains logs and controls to assure timely accomplishment of work and goals, such as industry meetings, management reviews, physical inspections, audit review, etc. Assists staff in follow-up as necessary.
- Prepares various program and administrative reports, computer generated reports, charts and status reports on multifamily projects as needed and requested by the Division Director.
- The incumbent is responsible for respecting the customer, and demonstrating that respect through courteous treatment; directing customers and correspondence to the appropriate party and offering to provide additional assistance; providing quality products through simple communication, following-up and reaching out to the client; and providing timely service and results which are monitored by soliciting feedback from customers. Quality customer service is a fundamental responsibility of the position.
- The incumbent functions in a "team" environment, offering and providing assistance as necessary and working cooperatively with others in order to complete work assignments and attain goals. Positive and effective teamwork as demonstrated through cooperation and coordination with other staff members is paramount in the effective delivery of HUD programs.
- Performs other duties as assigned.

NOTE: All HUD personnel will comply with safety regulations occupational safety and health standards, and other safety directives and orders.

FACTORS

FACTOR 1 -- KNOWLEDGE REQUIRED

Detailed knowledge of the FHA multifamily mortgage insurance and Section 202 811 programs. Knowledge of the multifamily housing mission, structure, and organizational relationships and their inter-relationships between the many programs and funding support functions as they are applied within HUD.

Ability to make formal and informal presentations; ability to communicate with diverse partners and customers both orally and in writing.

Ability to work independently and within a team concept.

FACTOR 2 -- SUPERVISORY CONTROLS

The Program Assistant reports directly to, and receives assignments from the Division Director. The incumbent independently performs routine assignments following established procedures. The Division Director provides additional and specific instructions for new, difficult and or unusual assignments. Work product is reviewed for accuracy by the Division Director.

FACTOR 3 -- GUIDELINES

Standard reference books, HUD manuals, dictionaries, HUD releases and guidelines are available as needed for reference purposes. In order to accomplish the desired results, the incumbent is expected to consult these reference books as well as a large body of unwritten policies, precedents and practices which are not completely applicable to the work and are not specific and which deal with matters relating to judgment, efficiency and relative priorities rather than with procedural concerns.

FACTOR 4 -- COMPLEXITY

The incumbent of this position requires the application of a practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his/her grade to arrive at a reasonable, workable and good decision. Daily and routine actions are based on sound judgment and usually accepted without detailed justification.

Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation within the PD Division.

FACTOR 5 -- SCOPE AND EFFECT

The responsibilities assigned to this position are for the purpose of developing and managing the HUD multifamily housing portfolio. The position serves as the principal focal point for HUD clients in the development and management of HUD's multifamily housing programs. The incumbent informs the public of programs and initiates the processing of applications for multifamily housing programs. Services and recommendations emitting from this position are comprehensive because of their effect on clients. Approval or disapproval of an application, the restriction or termination of projects, legal actions, and the overall success or failure of the Department's objectives are involved.

FACTOR 6 -- PERSONAL CONTACTS

Personal contacts include visitors from other offices within the Department of Housing and Urban Development, representatives of Public Housing Authorities, city governing bodies, legal aids, sponsors, mortgagees, community groups, and professional groups. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, residents, and local governmental officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 -- PURPOSE OF CONTACTS

Contacts are to advise on multifamily, housing programs and policies; to provide technical assistance, exchange information, resolve differences, and serve to enhance Department public relations; to give and obtain information; to set up meetings or arrange travel; and to coordinate and ensure the release of correspondence and reports within required deadlines.

FACTOR 8 -- PHYSICAL DEMANDS

This position places no physical demands on the employee. The work includes some walking, standing, bending and carrying of light items such as paper and books.

FACTOR 9 -- WORK ENVIRONMENT

The work of this position involves the normal risks and discomforts typical of an office environment. Occasional travel may be required.

Realty Specialist

GS-1170-11/12

Introduction

This position is located in the Property Disposition Division, Office of Asset Management & Portfolio Oversight. The incumbent is responsible for providing advice and program support for all property disposition activities including management, relocation, foreclosure, acquisition and disposition activities of HUD multifamily projects including both residential and commercial properties, and has broad responsibilities throughout the jurisdiction of the Division for assuring the management integrity and financial viability of housing projects managed or owned by HUD; maximizing the use of independent contractors for project operations and repairs; and obtaining tenant and community input prior to disposition of HUD-owned projects. To achieve these goals, the incumbent: (1) implements HUD policy designed to protect the government's interest in projects and to improve the living conditions of residents; (2) provides technical advice and program guidance to owners, purchasers, attorneys, Unit of Local Government personnel, and contract management agents to improve management operations and resolve project problems; (3) solicits interest in the purchase of properties and negotiates details of sales to State or local government entities or non-profit groups; and (4) negotiates with third parties on range of operations, financial, maintenance, occupancy, political and social aspects that may be encountered through HUD's ownership and or management of multifamily properties.

Major Duties and Responsibilities

The incumbent demonstrates detailed and in-depth knowledge of HUD Handbooks, statutes and regulations, commercial real estate principles and practices, and property management practices. In addition, the incumbent performs the following duties and responsibilities:

- The Realty Specialist serves as a technical advisor to the Property Disposition Division Director on all matters related to the acquisition, management, repair and sale of HUD-owned projects and foreclosures of defaulted loans.
- The incumbent regularly services difficult and complex multifamily projects which may have controversies, opposing special interest groups, adverse economic or environmental circumstances and impact on the community.
- The incumbent actively promotes resident initiatives in every aspect of work, where possible and practical. Serves as Team Leader on intra and cross functional teams. The incumbent acts as a mentor for lower graded staff.
- The incumbent serves as a technical resource staff person for the Director, Property Disposition Division and provides advice and guidance to the other Division staff on all matters pertaining to statutory and regulatory requirements and other administrative directives. The Director, Property Disposition Branch, must be able to place great reliance on technical information and analyses provided by the incumbent.

- The incumbent may be delegated authority to sign correspondence prepared by lower graded staff. In addition, the incumbent may serve as Team Leader within the organization as determined by the Director, Property Disposition Branch and Director, Office of Asset Management & Portfolio Oversight. The incumbent is assigned a portfolio consisting largely of the most complex projects. Assignments are characterized by their complicated design and mechanical and structural features, by their size in terms of the number of units and dollar value, and by the sensitivity of the project in the community.
- The incumbent reviews cases and develops solutions for the Division Director. The incumbent explains work requirements, methods, and procedures as needed, giving instructions on difficult or different operations, including advice and guidance to lower graded employees within their discipline.
- The incumbent formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. The incumbent clarifies published guidelines and explains regulatory requirements.
- Upon request of the Director, Property Disposition Division, the incumbent performs technical reviews of work in progress or finished work products for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Director, Property Disposition Division and to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists the Director, Property Disposition Division in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- The incumbent assists the Division Director in providing on-the-job training to other employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to the Director and other Supervisory staff of other formal and informal training needs.
- Prepares and reviews disposition and foreclosure recommendations. Presents foreclosure and disposition programs for approval.
- Performs pre-acquisition procedures requisite to assuming ownership and management.
- Develops recommendations for assuming interim control through petitioning courts for appointment as mortgagee-in-possession or as receivers.

- Establishes projects in the PIPELINE using PMS or its successor system. Monitors projects in the PIPELINE and ensures the database is kept up-to-date from the date of the Hearing Letter through foreclosure sales, HUD ownership and sales, sales closing and post-closing repair.
- When HUD is mortgagee-in-possession, secures management services; trains the property manager in proper accounting procedures utilizing PMS or its successor system; transfers leases and security deposits to HUD; secures and protects the property; and advertises vacancies and maintains the property.
- During the foreclosure process, incumbent acts as the liaison with the Office of General Counsel, the U.S. Attorney or foreclosure commissioner, project owner, manager and potential purchasers. As required, the incumbent may represent HUD at the foreclosure sale in the capacity as bidder representing the Secretary's interest.
- For both the HUD-owned and MIP properties, incumbent obtains contract property management services; assigns Property Managers in PMS or its successor system; trainings managers; approves rental rates; approves and monitors operating budgets utilizing PMS or its successor system; coordinates for data input; reviews monthly reports of project activity as submitted by Property Managers that include accounting reports of collections and disbursement; certifies and forwards monthly accounting reports to the Service Center; and oversees all management activities that includes taking actions to correct improper or ineffective property manager activities to enforce compliance with the contract.
- Prepares a variety of correspondence such as position papers, briefing packages, and replies to inquiries from Congress, citizen groups, industry groups, contractors, and other HUD customers.
- Reviews write-offs and makes decisions regarding approval. Approves write-offs in the System.
- Using all information available about the project, develops a foreclosure or disposition program that meets the prescribed goals and time frames.
- Following sales program approval, incumbent prepares the sale bid kit; advertises the project for sale; provides project information prospectus and technical guidance to interested purchasers; and reviews and recommends sales offers for acceptance.
- Upon acceptance of sales offer; coordinates the sales closing with Office of Counsel and foreclosure Commissioner as appropriate. Assures transfer of all leases, security

deposits and other management functions to new owner and transfers servicing post-closing responsibilities.

- Reviews PIPELINE reports monthly to ensure accuracy of the database for projects in the foreclosure, property management, relocation, post-closing repair, Upfront Grant, or post-closing transactions PIPELINE and makes recommendations to improve data reporting or data quality.
- Updates the system as activity occurs regarding project status.
- Ensures all operating budgets and, if appropriate, rehabilitation budgets are entered and approved in the PMS system or its successor system.
- Ensures contracts and purchase orders as applicable are entered into the PMS or its successor system.
- Reviews monthly property management system accounting reports and end of month management agent reports for compliance with HUD PMS rules and regulations.
- Reconciles monthly accounting reports from the Property Manager with PMS or its successor system. Makes site visits to determine the accuracy of reported data where appropriate.
- Provides technical guidance and programmatic consultation concerning processing, funding procedures, and operational criteria for the Section 8 certificates and vouchers program as used in conjunction with Multifamily sales. Prepares Section 8 funding requests for projects to be sold with rental assistance and maintains tracking log.
- Enters data on repair inspections and occupancy reviews into the system. Coordinates with Construction Analyst to release Letter(s) of Credit or other security when repairs have been acceptably completed and the appropriate post-repair has passed.
- Reviews IG audits of projects, takes necessary action to have mortgagors comply with the regulations, and recommends closing of HUD-OIG audit findings when compliance has been attained.
- Assists the Division Director in assuring that workload is prioritized and scheduled; activities are scheduled or reassigned as appropriate; computerized multifamily processing systems are used appropriately; data systems and automated reporting systems are in place and accurate to assure work items and projects can be tracked and analyzed; actions are taken to enhance program results; operations are adjusted when necessitated by changing demand and or reduction in resources and accurate and timely

reporting of operations and activities is accomplished. Keeps the management staff advised of sensitive situations and exceptions to standard processing in their respective area.

- At the request of the Division Director, reviews, interprets, and trains other personnel in new policy, procedures, and regulations.
- Provides training to property management agents on new programs, changes in HUD policies, procedures, regulations. Responsible for dissemination of information to management agents, residents and other customers.
- The incumbent is responsible for respecting the customer, and demonstrating that respect through courteous treatment; directing customers and correspondence to the appropriate party and offering to provide additional assistance; providing quality products through simple communication, following-up and reaching out to the client; and providing timely service and results which are monitored by soliciting feedback from customers. Quality customer service is a fundamental responsibility of the position.
- The incumbent functions in a team environment, offering and providing assistance as necessary and working cooperatively with others in order to complete work assignments and attain goals. Positive and effective teamwork as demonstrated through cooperation and coordination with other staff members is paramount in the effective delivery of HUD programs.

Senior Realty Specialist

GS-1170-13

INTRODUCTION

This position is a senior level position and is located in the Property Disposition Division, Office of Asset Management & Portfolio Oversight. The incumbent is responsible for providing expert level advice and program support for all property disposition activities including management, relocation, foreclosure, acquisition and disposition activities of HUD multifamily projects including both residential and commercial properties, and has broad responsibilities throughout the jurisdiction of the Division for assuring the management integrity and financial viability of housing projects managed or owned by HUD; maximizing the use of independent contractors for project operations and repairs; and obtaining tenant and community input prior to disposition of HUD-owned projects. To achieve these goals, the incumbent: (1) implements HUD policy designed to protect the government's interest in projects and to improve the living conditions of residents; (2) provides technical advice and program guidance to owners, purchasers, attorneys, Unit of Local Government personnel, and contract management agents to improve management operations and resolve project problems; (3) solicits interest in the purchase of properties and negotiates details of sales to State or local government entities or non-profit groups; and (4) negotiates with third parties on range of operations, financial, maintenance, occupancy, political and social aspects that may be encountered through HUD's ownership and or management of multifamily properties.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent demonstrates detailed expertise and in-depth knowledge of HUD Handbooks, statutes and regulations, commercial real estate principles and practices, and property management practices. In addition, the incumbent performs the following duties and responsibilities:

- The Senior Realty Specialist serves as a senior technical advisor to the Property Disposition Division Director on all matters related to the acquisition, management, repair and sale of HUD-owned projects and foreclosures of defaulted loans.
- The incumbent regularly services difficult and complex multifamily projects which may have controversies, opposing special interest groups, adverse economic or environmental circumstances and impact on the community.
- The incumbent actively promotes resident initiatives in every aspect of work, where possible and practical. Serves as Team Leader on intra and cross functional teams. The incumbent acts as a mentor for lower graded staff.
- The incumbent serves as the principal technical resource staff person for the Director, Property Disposition Division and provides advice and guidance to the other Division staff on all matters pertaining to statutory and regulatory requirements and other

administrative directives. The Director, Property Disposition Branch, must be able to place great reliance on technical information and analyses provided by the incumbent.

- The incumbent prepares and signs most correspondence addressed to owners, purchasers, attorneys, Units of Local Governments, managing agents, contractors, and project residents. The incumbent may be delegated authority to sign correspondence prepared by lower graded staff. In addition, the incumbent may serve as Team Leader within the organization as determined by the Director, Property Disposition Branch and Director, Office of Asset Management & Portfolio Oversight.
- The incumbent is assigned a portfolio consisting largely of the most complex projects. Assignments are characterized by their complicated design and mechanical and structural features, by their size in terms of the number of units and dollar value, and by the sensitivity of the project in the community.
- The incumbent is considered a senior staff member who personally performs duties involving the most complex and controversial cases and develops solutions to issues that could not be assigned to less knowledgeable or less experienced staff. The incumbent explains work requirements, methods, and procedures as needed, giving special instructions on difficult or different operations, including advice and guidance to lower graded employees within their technical disciplines. The incumbent may be called upon to testify in State or Federal Court on matters within the incumbent's responsibility and sphere of knowledge.
- The incumbent formulates and issues verbal and written instructions and procedures and provides special instructions for non-routine or complex assignments. The incumbent clarifies published guidelines and explains regulatory requirements.
- Upon request of the Director, Property Disposition Division, the incumbent performs technical reviews of work in progress or finished work products of colleagues for accuracy, adequacy, and soundness. The incumbent makes recommendations to the Director, Property Disposition Division and to colleagues for improvement of work products, particularly where adherence to statutory or regulatory requirements may be questionable. The incumbent assists the Director, Property Disposition Division in resolving technical work problems not covered by established policies or procedures and may develop solutions that are precedent setting, and in estimating and reporting on expected time of completion of required work.
- The incumbent assists the Division Director in providing on-the-job training to other employees. This includes providing information about the policies, procedures, and practices of the particular multifamily case being discussed as it relates to the work being accomplished. The incumbent identifies and recommends to the Director and other Supervisory staff of other formal and informal training needs.

- Prepares and reviews disposition and foreclosure recommendations. Presents foreclosure and disposition programs for approval.
- Performs pre-acquisition procedures requisite to assuming ownership and management. Develops recommendations for assuming interim control through petitioning courts for appointment as mortgagee-in-possession or as receivers.
- Establishes projects in the PIPELINE using PMS or its successor system. Monitors projects in the PIPELINE and ensures the database is kept up-to-date from the date of the Hearing Letter through foreclosure sales, HUD ownership and sales, sales closing and post-closing repair.
- When HUD is mortgagee-in-possession, secures management services; trains the property manager in proper accounting procedures utilizing PMS or its successor system; transfers leases and security deposits to HUD; secures and protects the property; and advertises vacancies and maintains the property.
- During the foreclosure process, incumbent acts as the liaison with the Office of General Counsel, the U.S. Attorney or foreclosure commissioner, project owner, manager and potential purchasers. As required, the incumbent may represent HUD at the foreclosure sale in the capacity as bidder representing the Secretary's interest.
- For both the HUD-owned and MIP properties, incumbent obtains contract property management services; assigns Property Managers in PMS or its successor system; trainings managers; approves rental rates; approves and monitors operating budgets utilizing PMS or its successor system; coordinates for data input; reviews monthly reports of project activity as submitted by Property Managers that include accounting reports of collections and disbursement; certifies and forwards monthly accounting reports to the Service Center; and oversees all management activities that includes taking actions to correct improper or ineffective property manager activities to enforce compliance with the contract.
- Prepares a variety of correspondence such as position papers, briefing packages, and replies to inquiries from Congress, citizen groups, industry groups, contractors, and other HUD customers.
- Reviews write-offs and makes decisions regarding approval. Approves write-offs in the System.
- Using all information available about the project, develops a foreclosure or disposition program that meets the prescribed goals and time frames.

- Following sales program approval, incumbent prepares the sale bid kit; advertises the project for sale; provides project information prospectus and technical guidance to interested purchasers; and reviews and recommends sales offers for acceptance.
- Upon acceptance of sales offer; coordinates the sales closing with Office of Counsel and foreclosure Commissioner as appropriate. Assures transfer of all leases, security deposits and other management functions to new owner and transfers servicing post-closing responsibilities.
- Reviews PIPELINE reports monthly to ensure accuracy of the database for projects in the foreclosure, property management, relocation, post-closing repair, Upfront Grant, or post-closing transactions PIPELINE and makes recommendations to improve data reporting or data quality.
- Updates the system as activity occurs regarding project status.
- Ensures all operating budgets and, if appropriate, rehabilitation budgets are entered and approved in the PMS system or its successor system.
- Ensures contracts and purchase orders as applicable are entered into the PMS or its successor system.
- Reviews monthly property management system accounting reports and end of month management agent reports for compliance with HUD PMS rules and regulations. Reconciles monthly accounting reports from the Property Manager with PMS or its successor system. Makes site visits to determine the accuracy of reported data where appropriate.
- Provides technical guidance and programmatic consultation concerning processing, funding procedures, and operational criteria for the Section 8 certificates and vouchers program as used in conjunction with Multifamily sales. Prepares Section 8 funding requests for projects to be sold with rental assistance and maintains tracking log.
- Enters data on repair inspections and occupancy reviews into the system. Coordinates with Construction Analyst to release Letter(s) of Credit or other security when repairs have been acceptably completed and the appropriate post-repair has passed.
- Reviews IG audits of projects, takes necessary action to have mortgagors comply with the regulations, and recommends closing of HUD-OIG audit findings when compliance has been attained.
- Assists the Division Director in assuring that workload is prioritized and scheduled; activities are scheduled or reassigned as appropriate; computerized multifamily processing systems are used appropriately; data systems and automated reporting

systems are in place and accurate to assure work items and projects can be tracked and analyzed; actions are taken to enhance program results; operations are adjusted when necessitated by changing demand and or reduction in resources and accurate and timely reporting of operations and activities is accomplished. Keeps the management staff advised of sensitive situations and exceptions to standard processing in their respective area.

- At the request of the Division Director, reviews, interprets, and trains other personnel in new policy, procedures, and regulations.
- Provides training to property management agents on new programs, changes in HUD policies, procedures, regulations. Responsible for dissemination of information to management agents, residents and other customers.
- The incumbent is responsible for respecting the customer, and demonstrating that respect through courteous treatment; directing customers and correspondence to the appropriate party and offering to provide additional assistance; providing quality products through simple communication, following-up and reaching out to the client; and providing timely service and results which are monitored by soliciting feedback from customers. Quality customer service is a fundamental responsibility of the position.
- The incumbent functions in a team environment, offering and providing assistance as necessary and working cooperatively with others in order to complete work assignments and attain goals. Positive and effective teamwork as demonstrated through cooperation and coordination with other staff members is paramount in the effective delivery of HUD programs.

Multifamily Risk Management Division

Counterparty Risk Management Specialist

GS-1101-13

INTRODUCTION

This position is located in the Counterparty Risk Management Branch, Multifamily Risk Management Division, Office of Asset Management & Portfolio Oversight. The Risk Management Counterparty Branch has responsibility for oversight of FHA-approved multifamily mortgage loan servicers, originators and other counterparties that enter into business relationships with the Federal Housing Administration. Additionally, this Branch is responsible for monitoring distressed counterparties, reviewing of merger and acquisition transactions and the formulation of mitigants to risks presented to FHA. The primary purpose of this position is to plan and conduct studies and analyses to promote efforts to ensure that FHA, with respect to counterparty risk policy and oversight, protects the interests of the United States government and taxpayers.

MAJOR DUTIES AND RESPONSIBILITIES

- Plan, organize, and conduct projects, studies, and analyses of risk issues, including risk assessments of counterparties, products, activities and portfolios to maintain awareness of industry best practices, trends and innovations, particularly as they relate to counterparty credit risk management.
- Develop sources of knowledge, including in the capital markets and the credit industry, to measure the long and short term performance of FHA servicers and originators.
- Support the Issuer approval process in conjunction with the Office of Issuer and Portfolio Management of all non-streamlined requests for commitment authority (limits management).
- Determine the financial health and continuity of the issuing financial organizations by analyzing compliance with FHA's eligibility requirements.
- Identify and conduct reviews of stressed issuers and develop remediation work out plans that minimize the occurrence of credit defaults or recommend disciplinary.
- Maintain current and accurate eligibility status of each lender.
- Develop, maintain and update counterparty risk policies, including eligibility requirements, exposure limits, and exceptions and/or alternatives to basic requirements; develop recommendations for managing program risk.

- Assist servicers and originators in routine business activities including interpretation of FHA guidelines.
- Perform other duties as assigned.

FACTORS

FACTOR 1 – KNOWLEDGE REQUIRED BY THE POSITION

Mastery of financial management theories, principles, and current trends with respect to fixed income securities and their characteristics; financial statement analysis, including analysis of inter-corporate investments and business combinations; quantitative analysis methods (including statistics, correlation analysis and regression, simulation analysis, etc.); analysis of the impact of economic factors on investment markets; valuation of assets; and, generally accepted accounting principles (GAAP) to develop practices and procedures that guide counterparty risk management activities including the prudent and effective financial management of the business risks posed by FHA issuers and other counterparties; and to provide advice and guidance in the area of counterparty risk policy development and management.

Expert knowledge of financial statement analysis, key concepts regarding the application of GAAP in financial institutions, mortgage industry practices, products, trends and profit structures to develop approaches for identifying, measuring and managing risks, and to provide advisory services not just with respect to FHA, but with respect to the U.S. mortgage market.

Expert knowledge secondary financial markets, credit industry, and industry risk management practices, including factors that can affect FHA's risk exposure, such as financial stability, servicing capability, adequacy of insurance coverage, etc.; and an full understanding of the factors that influence issuer decisions sufficient to participate in FHA programs.

Knowledge of Fannie Mae, Freddie Mac, Ginnie Mae, VA and Rural Development programs to keep abreast of changes in those programs and their impact or influence on FHA mortgage backed security programs

Communication skills to assist and monitor issuers, communicate concerns to superiors, and persuade high-level officials to approve certain actions.

FACTOR 2 – SUPERVISORY CONTROLS

The work is performed under the administrative and technical direction of the Chief, Counterparty, who assigns work in terms of priorities, funding and overall project objectives. The incumbent is expected to plan and carry out all work independently and provide work products considered as technically authoritative. Analyses, evaluations, and recommendations developed are normally reviewed by the supervisor for potential influence on broad agency

policy objectives and program goals; and for compatibility with organizational goals, guidelines, and effectiveness in achieving intended FHA objectives.

FACTOR 3 – GUIDELINES

Guidelines include general Federal and departmental regulations (including, for example, the National Housing Act, as well as the relevant sections of Title 24 of the Code of Federal Regulations implementing the statute); specific program administrative policy statements, regulations, and instructions; and Federal and HUD Acquisition Regulations in addition to procurement policies and procedures. The employee uses judgment and discretion in interpreting and revising existing policy for use by others; and recommends modifications to FHA guidelines and concepts such as counterparty credit risk management policies.

FACTOR 4 – COMPLEXITY

The primary purpose for this position is to ensure that FHA is in the vanguard of financial institutions with respect to counterparty risk policy and oversight to protect the interests of the U.S. government and U.S. taxpayers. The incumbent anticipates potential negative implications for FHA of what may appear to be business-as-usual activities. Incumbent prepares plans, goals and objectives for implementation and administration of assigned GTR/GTM efforts and develops criteria for evaluating effectiveness of a given contracted effort. The work consists of projects that require analysis of interrelated issues on the effectiveness and productivity within the program area. Options, recommendations and conclusions developed by the incumbent take into account and give appropriate weight to uncertainties about the data and other variables, which affect long range program performance and program risk.

FACTOR 5 – SCOPE AND EFFECT

The purpose of the work is to analyze, monitor and evaluate technical program aspects of substantive contracted mission oriented activities for FHA; and develop and implement new and innovative approaches to monitor FHA counterparties to keep pace with dynamic markets. This involves recommending program plans, goals, objectives and milestones, as well as strategies for effective implementation. Incumbent identifies and develops ways to resolve problems or cope with issues that directly affect accomplishment of program goals and objectives. Incumbent evaluates the effectiveness of technical aspects of assigned efforts. The work has a direct impact on the fulfillment of FHA program functions.

FACTOR 6 AND 7 – PERSONAL CONTACTS & PURPOSE OF CONTACTS

Contacts are with FHA managerial staff and supervisors, in addition to, contractor staff and some managers within the Department. They also include significant contacts with private sector representatives and mortgage industry associations. The purpose of the contacts is to influence program managers or other officials in position of decision-making authority with widely differing goals and interests to follow a recommended course of action consistent with established oversight and management policies. Contacts ensure increased efficiency and effectiveness for the purpose of program mission accomplishment. At this level, contacts may involve some resistance due to organizational conflict, competing objectives, and resource problems.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary.

FACTOR 9 – WORK ENVIRONMENT

Work is performed in an adequately lighted, heated, and ventilated office.

DRAFT

Director

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Office of Office of Asset Management & Portfolio Oversight and reports to the Deputy Director, Office of Asset Management & Portfolio Oversight. The incumbent serves as the Director of the Multifamily Risk Management Division and is responsible for portfolio risk and Watchlist oversight and counterparty risk management. The incumbent performs supervisory duties to assure that the Division meets established goals and objectives.

MAJOR DUTIES AND RESPONSIBILITIES

Incumbent is directly responsible for the overall activities of the Division. In this capacity:

- Defines broad policy objectives of the Division to effectuate legislative, regulatory, and administrative goals, policies, and procedures with respect to the assigned programs.
- Directs the development of criteria, instructions, and guidelines to achieve the goals and mission of the Division.
- Directs the development and implementation of training curricula for use by Headquarters and field staff with respect to the program and operational jurisdiction of the Division.
- Serves as the principal advisor to the Office Director regarding the programs for which the Division is responsible.
- Provides information, advice, and guidance to Congressional representatives, Departmental officials, representatives from other governmental agencies, and other clients regarding programs administered by the Division.
- Coordinates the activities of the Division with those of other Departmental program areas to assure the accomplishment of overall goals and objectives.
- Evaluates the effectiveness of policies and procedures developed or implemented by the Division, and develops recommendations for improvement where necessary.
- Interprets and provides guidance on established procedures to Headquarters and field staff, representatives from other program areas, non-HUD clients, etc.
- Directs the daily activities of the Division, including:
 - Coordinating with other Housing Offices and Divisions on projects involving the Division's responsibilities.
 - Planning of work to be accomplished by the staff of the Division, including establishing goals, priorities, and schedules for work completion.
 - Guiding, instructing, advising, and counseling staff members on work assignments, standards, and expectations.
 - Evaluating the performance of the Division's staff.

FACTOR LEVELS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: The incumbent supervises the Multifamily Risk Management Division, which is responsible for the implementation of laws and programmatic changes related to grant and housing assistance and disposition through regulations, handbooks, and notices.

Effect: Impacts HUD's headquarters and field operations nationwide; facilitates HUD's accomplishment of its primary mission, programs of national significance; and impacts large segments of the Nation's population, the nation's housing industry; and receives frequent congressional attention.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the supervision of the Deputy Director of Asset Management & Portfolio Oversight, who provides only limited reviews of the activities and work products of the incumbent. Review of the incumbent's work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The Director exercises full managerial responsibility for all employees in the Multifamily Risk Management Division. As Director, the incumbent assures implementation of the goals and objectives of the Office by planning work to be accomplished, setting and adjusting short and long-term work priorities, and preparing and reviewing work schedules.

Determines areas of emphasis, approaches, and initiates methods to increase work quality of the office. There are significant responsibilities when it comes to dealing with officials of other units or organizations; making decisions on non-routine, costly or controversial training needs and requests; examining and resolving group grievances or serious employee complaints; reviewing and approving serious disciplinary actions; recommending selections for subordinate positions for coordinating the work of others, and similar positions; approving expenses comparable to within-grade increases, extensive overtime, and employee travel; recommending awards of bonuses for non-supervisory personnel and changes in position classification; subject to approval by higher level officials, supervisors, or others; finding and implementing ways to eliminate or reduce significant barriers to production, promote team building, or improve business practices.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A -Nature of Contacts

Frequent contacts include HUD managers, supervisors, and technical staff, Office of Multifamily Housing management officials, and managers and staff of other Federal agencies and government corporations, public contractors, private businesses, and representatives of state and local governments.

Sub-factor 4B- Purpose of Contacts

The purpose is to influence, motivate, or persuade groups or individuals to accept and implement program regulations and to justify, defend, or negotiate in representing the program and gaining compliance with established policies, regulations or contracts. In addition, the interactions that occur are for the purpose of directing contracts, coordinating activities, negotiation and resolving complex issues and requirements and providing advice and guidance. Contacts usually involve active participation in conferences, meetings, hearings, or presentations involving problems or issues of considerable consequence or importance to the program managed.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

At least 25% of the non-supervisory duty hours of subordinates and others (i.e., contractor employees) are expended on work at the GS-13 level or above.

FACTOR 6 - OTHER CONDITIONS

Supervision and oversight requires exceptional coordination and integration of a number of very important and complex program segments or programs of professional, technical, managerial, or administrative work comparable in difficulty to the GS-13 or higher level. Supervision and resource management at this level involves major decision and actions, which have a direct and substantial effect on the organizations and programs managed.

Management Analyst (GS-0343-12)

GS-0343-12

MULTIFAMILY RISK MANAGEMENT DIVISION

INTRODUCTION

This incumbent performs analysis and advisory assignments related to the effectiveness of government programs and or the efficiency of the management of government operations.

MAJOR DUTIES AND RESPONSIBILITIES

Conducts detailed analyses of complex functions and work processes of broad administrative or technical programs and makes recommendations for improvement in the effectiveness and efficiency of work operations. Develops new methods, organizational structures and management processes. Counsels and advises program managers on methods and procedures, management surveys, management reports, and control techniques.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of Federal and agency regulations; knowledge of the specific organization's programs and missions; as well as knowledge of pertinent laws, regulations, and policies related to program operations area to consider their impact on programs.
- Knowledge of qualitative and quantitative techniques for measuring effectiveness, efficiency, and productivity of assigned programs.
- Skill in applying analytical and evaluative methods and techniques in developing of new procedures and approaches to identify and resolve significant issues and problems of a unique nature.
- Ability to communicate effectively to make recommendations to management and brief them.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides limited direction, setting the overall project objectives. The supervisor, in consultation with the incumbent, develops deadlines and project plans. The incumbent is responsible for independently performing assignments and keeping the supervisor apprised of potentially controversial issues. Completed work is reviewed for effectiveness in meeting organizational goals and overall feasibility.

FACTOR 3 - GUIDELINES

Guidelines consist of broadly stated mission objectives and Federal regulations. The incumbent conducts extensive analysis and interpretation in applying the provisions of the numerous and complex guidelines. Independent research is conducted to determine the applicability of the guidelines for many unique and difficult assignments and modify them accordingly.

FACTOR 4 - COMPLEXITY

The work involves duties requiring different processes and methods. These include the in-depth analysis of program requirements, budgetary constraints, regulatory limitations, and agency policy. The incumbent makes decisions regarding the design of plans and assesses circumstances and data available. The incumbent makes decisions, interprets considerable data, plans the work, and refines the methods and techniques to be used.

FACTOR 5 - SCOPE AND EFFECT

The incumbent is responsible for all phases of assignments. The work has a major impact on the efficiency and effectiveness of operations that contributes to overall productivity of the organization. The work involves studies of administrative and managerial processes and procedures to assess and subsequently refine the productivity, effectiveness, and efficiency of program operations. The issues involved may cross-organizational lines or geographical areas. The studies performed could affect the administrative methods of the managerial processes of the organization.

FACTORS 6 AND 7 - PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts include employees and top managers within the organization, as well as managers at various levels within private industry. Contacts occur through meetings, at which the incumbent presents proposals or issues for negotiation. Contacts are for negotiation and consultation, as well as to provide information of a technical nature. The incumbent develops approaches to reach a mutual understanding of a situation.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a typical office setting.

JOB COMPETENCIES (The full range of competencies for the occupational series is provided for information and development purposes; not every competency displayed is required at the individual position level.)

Management Analyst (GS-343-13)

GS-343-13

MULTIFAMILY RISK MANAGEMENT DIVISION

INTRODUCTION

This is a standard position description which may be used in any of the Housing organizations. The Office of the Assistant Secretary for Housing-Federal Housing Commissioner is responsible for developing, implementing, and maintaining the mortgage insurance and multifamily and single family housing programs and related functions for production, financing, and management of such housing and the conservation and rehabilitation of housing stock or related regulatory functions.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent provides program support and assistance in the analysis and development of policy, legislation and research and performs the following specific functions:

- Researches and investigates new or improved business and management practices for application to Housing programs and operations.
- Identifies data required for use in the management and direction of programs.
- Develops management plans, procedures, and methodology;
- Conducts complex and special studies for efficiency and productivity and recommends changes or improvements in work methods, and procedures.
- Develops procedures and systems for establishing, operating, and assessing the effectiveness of administrative control systems.
- Analyzes and evaluates Housing functions and activities being considered for conversion to contract operations.
- Identifies resources (funding, equipment, facilities) required to support varied level of program operations.
- Reviews administrative audits and investigative reports to recommend appropriate changes or corrective action required.
- Defines, plans, develops, and implements controls and procedures for the organizations in Headquarters and the Field structures.
- Performs extensive and in-depth reviews for a more efficient and effective mission and function.
- May serve as a team leader or member in developing and/or implementing improvements to the mission function of the organization in its Headquarters and Field structure.
- Develops and implements management procedures and policies in Housing Headquarters and it Field structure.
- Conducts special cost benefits analyses, studies, reports, surveys, inquiries, and evaluations.

- Prepares oral and written reports and presentations; prepares graphs and charts that present clear, concise, and effective analytical results of, evaluations and studies performed; provides staff level with formal presentations.
- Prepares replies to inquiries from Members of Congress, other Government agencies, Field Offices, Contractors, and the general public on very complex and substantive questions relating to Housing's operations and management.
- Represents the office, as needed, in meetings, workshops and conferences.
- This position may have access to sensitive HUD systems at the supervisor's discretion and as identified in the Management Survey. Draft responses to correspondence assigned to the office.
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert Knowledge and mastery of the application of a wide range of qualitative or quantitative methods for assessing and improving effectiveness.
- Expert knowledge of the range of administrative laws, policies, regulations, and precedents applicable to the Housing's programs.
- Expert knowledge of Housing's program goals and objectives, the sequence and timing of key program events and milestones, and methods of evaluating the worth of program accomplishments.
- Expert knowledge of relationships with other programs and key administrative support functions within Housing.
- Expert knowledge of the organizational structure, functions and procedures of Housing, and their relationships with the other program areas of the Department.
- Expert knowledge and ability to design and conduct comprehensive management studies of housing programs.
- Expert knowledge and ability to assemble and analyze relevant facts and draw significant conclusions.
- Expert knowledge and skill in presenting accurate findings and the ability to make feasible and responsive recommendations both orally and in writing. These recommendations may require negotiations with management to accept extensive changes in established procedures or they may involve substantial resources.
- Expert knowledge and skill in the use of computers.

FACTOR 2 - SUPERVISORY CONTROLS

Within a framework of priorities, funding and overall project objectives, the employee and Supervisor develop a mutually acceptable project plan. The employee is responsible for planning and organizing the study, estimating costs, coordinating with staff and line management personnel, and conducting all phases of the project. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with

organizational goals, guidelines, clarity of presentation, soundness of conclusions and effectiveness in achieving intended objectives.

FACTOR 3 - GUIDELINES

The incumbent is guided by oral instructions; laws decisions, rules and regulation governing Housing and related programs; overall HUD management policies; and standard management principles and practices. The existing studies and policies must often be revised to accomplish the project goals. Within the context of broad regulatory guidelines the employee may refine or develop more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness and productivity in the administration of operating programs.

FACTOR 4 - COMPLEXITY

The work consists of projects and studies, which require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the long-range implementation and administration of a specific Housing program, and or developing criteria for evaluating its effectiveness. Decisions about how to proceed in planning, organizing and conducting studies are complicated by conflicting program goals and objectives, which may derive from changes in legislative or regulatory guidelines, productivity, and or variations in the demand for program services. Assignments are further complicated by: the need to deal with subjective concepts such as value judgments; the quality and quantity of actions are measurable primarily in predictive terms; and findings and conclusions are highly subjective and not readily susceptible to verification through replication of study methods or reevaluation of results. Options, recommendations, and conclusions developed by the employee take into account and give appropriate weight to uncertainties about the data and other variables, which affect long-range program performance.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to analyze and evaluate major administrative aspects of substantive, mission-oriented programs and to ensure that the Secretary and Assistant Secretary receive timely, accurate and complete data and project information for use in conjunction with out-of-town travel, meeting, speeches and other events. This may involve, for example, the development of long-range program plans, goals, objectives, and milestones, or evaluating the effectiveness of programs. The work involves identifying and developing ways to resolve problems or cope with issues, which directly affect the accomplishment of principal program goals and objectives. The work involves assisting in establishing criteria for assessing program effectiveness; reviewing, investigating and analyzing a variety of unusual conditions. Work also ensures that Housing's policies, legislation and research programs are consistent with Housing programs and Departmental priorities and that their impacts are fully described and understood.

Study reports typically contain findings and recommendations of major significance to HUD's top management, and often serve as the basis for new administrative systems, legislation, regulations, or programs. The end product of the incumbent affects the internal operations of

HUD, HUD's interaction with other entities in the housing field, and the operation of housing programs by other housing-related government agencies.

FACTORS 6 AND 7 - PERSONAL CONTACTS AND PURPOSE OF CONTACTS

Contacts within the Department are primarily for the purpose of obtaining program or project-related data and information and for exchanging views on Housing policies, legislation and research, which affect various Housing programs. Contacts are made to assist in planning, coordination, providing advice to resolve operating problems, and to influence managers or other officials to accept and implement findings and recommendations on organizational improvement or program effectiveness. Incumbent may encounter resistance due to such issues as organizational conflict, competing objectives, or resource problems.

FACTOR 8 - PHYSICAL DEMANDS

The work involves some walking, standing and carrying of documents. Some exposure to weather conditions is involved when traveling in the performance of duties.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a normal office environment.

May require occasional travel.

JOB COMPETENCIES (The full range of competencies for the occupational series is provided for information and development purposes; not every competency displayed is required at the individual position level.)

Program Analyst (GS-0343-9/11)

GS-0343-9/11

INTRODUCTION

This position is located in the Multifamily Risk Management Division within the Deputy Assistant Secretary of Multifamily Housing's Office of Asset Management & Portfolio Oversight. The incumbent of this position serves as a program analyst, responsible for functions relating to the review and analysis of multifamily housing programs and policies and the development of basic plans, policies and legislative proposals. The incumbent is responsible for being sufficiently knowledgeable about all of the policy issues concerning multifamily housing to perform assignments concerning them competently. At any point in time, the incumbent is also a staff expert on policy issue areas of major concern to the Director of the Office of Asset Management & Portfolio and the Deputy Assistant Secretary. Generally, the incumbent is responsible for performing assignments of moderate complexity in the issue areas for which he/she is assigned special responsibility.

In carrying out his/her other assignments, the incumbent has latitude to interact and negotiate with staff in other offices at the Office of Asset Management & Portfolio Oversight level or lower. He/she serves as a multifamily representative on any inter-HUD or inter-agency task force groups consisting of staff at these levels.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's specific duties follow:

- Analyzes programs and policy options and develops options papers and policy proposals, particularly with regard to economic;
- Analyzes new or proposed program policies and their impact on current overall Multifamily housing policies;
- Develops program designs to implement new programs and policies authorized by Congress for which organizational responsibility has not been assigned;
- Develops legislative proposals and coordinates development of legislative proposals by program offices;
- Reviews and analyzes legislative proposals and their impact on existing programs;
- Prepares testimony for appearances of program officials before Congressional committees; prepares briefing materials for these officials and explanatory materials for use by Congressional committees in relation to proposed legislation;

- Develops proposals concerning regulations for the use of the Office of General Counsel in issue areas for which the incumbent has special responsibility; tracks and expedites the development of regulations elsewhere in the Office of Multifamily Housing;
- Coordinates with and assists the Office of Policy Development and Research in program effectiveness evaluations;
- In coordination with the Office of Policy Development and Research, recommends and develops research programs in issue areas for which the incumbent is assigned special responsibility; negotiates with this office regarding funding and implementation of these proposals;
- In coordination with the Office of Policy Development and Research, monitors research contracts in the areas for which the incumbent is assigned special responsibility and the results of such research;
- In coordination with the Office of Policy Development and Research, prepares policy proposals that are based on the results of research; and
- Performs other duties as assigned.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge and skill in applying the basic principles, practices, and methods of program analysis to determine whether policies and program designs are in conformance with Congressional intent and overall Administration policy.
- Knowledge of legislative, regulatory and policy issues concerning Multifamily Housing and their relation to overall housing policies in order to develop policy options and proposals.
- Knowledge of organization, programs, missions, and functions of the Office of Multifamily Housing in order to evaluate and recommend ways to improve the organization's effectiveness and efficiency.
- Knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness and efficiency of Multifamily Housing programs.
- Knowledge of automated systems and their application to the program analysis field and program analysis ability to analyze quantitative data and prepare technical reports, analyses and guidance. -Skill in preparing policy papers and staff reports and skill in

delivering briefings to managers to encourage acceptance of findings and recommendations in complex technical areas.

- Skill in interpreting and applying complex legislative, policy and regulatory decisions to develop policies and guidance.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides limited direction, setting the overall project objectives. The supervisor, in consultation with the incumbent, develops deadlines and project plans. The incumbent is responsible for independently performing assignments and keeping the supervisor apprised of potentially controversial issues. Completed work is reviewed for effectiveness in meeting organizational goals and overall feasibility.

FACTOR 3 - GUIDELINES

Guidelines consist of standard Federal regulations and organizational directives. Procedural guidelines are not always applicable to specific project assignments; therefore, the incumbent must use judgment in selecting or adapting guides.

FACTOR 4 - COMPLEXITY

The incumbent is assigned projects that require gathering information, identifying and analyzing issues, and developing recommendations to resolve substantive problems of program effectiveness and efficiency. Studies often require qualitative and quantitative analytical techniques, which frequently require adjustments to fit a wider range of variables (e.g., socio-economic consequences and impact on long-range organizational goals and objectives). In some instances, the incumbent must develop data, which is currently unavailable about program effectiveness or efficiency, and the impact of policies on multifamily housing constituent groups. The incumbent prepares and advises managers on the preparation of detailed policy options and legislative proposals for various multifamily housing programs. Work involves the consideration of legal and regulatory constraints, budgetary constraints, and alternative means of accomplishing policy and program objectives. Work frequently involves making decisions and recommendations concerning complex policy options under conditions of high uncertainty and time pressure.

FACTOR 5 - SCOPE AND EFFECT

The work involves studies of administrative and managerial processes and procedures to assess productivity, effectiveness, and efficiency of program operations. The studies may involve one or several organizations and may affect the administrative methods of the organization, managerial processes, or the operating unit within the organization. The incumbent analyzes results and makes recommendations regarding studies of work processes and procedures. The incumbent applies the fundamental principles, practices, and procedures of program analysis to assess the effectiveness and efficiency of multifamily housing programs and to recommend policy and or legislative changes to enhance program performance. The tasks performed constitute a segment of the broader and more complex assignments of higher-graded co-workers within the Office. The incumbent provides advice and guidance to program staff on

issues of program effectiveness and efficiency, and effectiveness of multifamily housing programs at all levels of program implementation.

FACTORS 6 AND 7 - PERSONAL CONTACTS PURPOSE OF CONTACTS

Contacts are with employees, supervisors, and managers throughout the organization. Some contacts are with consultants, contractors or managers at the agency level. Contacts are for the purpose of gathering information to facilitate studies being conducted or exchanging information and discussing issues and options available. There may be some degree of controversy involved in the process of influencing others to accept ideas.

FACTOR 8 - PHYSICAL DEMANDS

The work is primarily sedentary, requiring no special physical demands.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in a typical office setting.

DRAFT

Program Analyst (GS-0343-12/13)

GS-0343-12/13

INTRODUCTION

This position is located in the Multifamily Risk Management Division, Office of Asset Management & Portfolio Oversight. The incumbent of this position serves as Program Analyst responsible for providing advice and assistance in the formulation and development of basic plans and policies for the Office of Multifamily Housing Programs; for the revision of program objectives and policies within the Office of Multifamily Asset Management & Portfolio Oversight; for evaluations of multifamily housing programs effectiveness; and for the review, evaluation, and development of major legislative and regulatory proposals which impact the programs within the Office of the Deputy Assistant Secretary for Multifamily Housing Programs.

MAJOR DUTIES AND RESPONSIBILITIES

The Program Analyst is responsible for being sufficiently expert in all of the functions and processes of major concern to the Deputy Assistant Secretary to handle complex assignments. The incumbent is responsible for maintaining a continuing expertise in some of these issue areas. Policy development often involves several phases, both legislative and regulatory, that must be coordinated with the Assistant Secretary, other policy officials in the Office of Multifamily Housing, the rest of HUD, other Federal departments, and the public housing industry. The incumbent works independently to plan, design and carry out policy development and analysis and his (her) recommendations often serve as the basis for new national policies or legislation. The incumbent defines and analyzes issues to determine the extent of a problem and the best method of resolution. The work may entail continuing efforts over a period of time to establish new policy directions and to deal with persistent problems in the development, management, or rehabilitation of multifamily housing or problems in other areas of the Assistant Secretary's purview. At the request of the Director or the Deputy Assistant Secretary for Multifamily Housing Programs, the incumbent represents the Office of Housing at meetings within the Department and with public housing industry leaders. At these meetings, the incumbent may be called upon to represent the Office's position on controversial issues. The persons contacted in such meetings and in the normal course of work typically have diverse viewpoints, goals, or objectives requiring the employee to achieve a common understanding of the problem. The incumbent makes recommendations about these difficult problems which are technically authoritative, subject to review by the Office and Division Director or Deputy Assistant Secretary as to conformance with general policies.

The incumbent's specific duties and responsibilities follow:

- Conducts economic and financial analyses of regulatory and statutory proposals, initiatives, and multifamily housing financing proposals submitted for review by outside parties, including use of statistical models to estimate impact of alternative financing scenarios, and evaluation of project-based management and accounting methods and principles.

- In coordination with the Office of Policy Development and Research (PDR), recommends and develops research programs, and negotiates with PDR regarding funding and implementation of these proposals; the incumbent may also serve as MFH Government Technical Monitor on research evaluation contracts or task orders, as appropriate.
- Coordinates with PDR in program effectiveness evaluations, and prepares policy proposals that are based on the results of those evaluations.
- Reviews and analyzes legislative proposals based on the Department's overall goals and program needs to ensure that there is no negative impact of such legislation on existing public housing policies or legislation. Develops legislative proposals and coordinates their development by program offices.
- Prepares and presents written reports or oral narratives to the DAS for Multifamily Housing Programs, program office DASs, and the Assistant Secretary.
- Works directly with other policy officials in the Office Multifamily Housing, and the rest of HUD, in order to resolve complex policy issues of exceptional importance. In addition, works directly for the Office Director or Deputy Assistant Secretary on special assignments and or in support of on-going responsibilities.
- Prepares and delivers narrative reports and recommendations on justifications and section-by-section analyses of legislative proposals and amendments relating to Multifamily Housing programs for Offices within the Department which have coordination roles in legislative matters between the Department and Congress.
- Develops policies, in consultation with the affected Offices, in areas where the issues are not primarily within the jurisdiction of a single program office. This is designed to ensure that all issues including the Office of Multifamily Housing policy within the Office of the Deputy Assistant Secretary are addressed.
- Analyzes program and policy options in the field of Multifamily in coordination with MF program offices and the Office of Policy Development and Research, develops option papers for use in making policy decisions. Such option papers are designed to outline the pros and cons of a series of recommended approaches to resolving an issue, and may include narrative justifications, historical perspective, financial and or economic impact, and a recommended or most favored approach.
- Handles policy issues of major concern to the Office Director and the Deputy Assistant Secretary. Assignments are of the utmost importance and complexity.
- Prepares top quality work products in any of these issue areas. Responsible for maintaining a continuing authoritative expertise in some of these issues areas.
- Develops, in coordination with Office DASs, initial program designs to implement new programs and policies authorized by Congress for which immediate organizational responsibility has not been assigned elsewhere.
- Provides advice, by written reports or orally, on broad aspects of MF Housing operations and on general conditions affecting the operation of programs within the Office of Housing.
- Performs other duties as assigned.

FACTOR LEVELS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert as well as a specialized knowledge of the operations of Government, both in the Executive Branch and the Congress, and of economic and financial issues impacting multifamily housing such as alternative financing methods (loan guarantees, bond financing, etc.).
- Ability to conduct statistical analyses of economic and financial information, and to design and conduct evaluations and make recommendations based on existing program regulations and procedures, based on available program data; the ability to quickly analyze, discuss, and write authoritatively on a variety of complex issues crossing program and departmental lines and requiring an understanding and careful balancing of conflicting interests.
- Ability to negotiate and favorably resolve matters which may be sensitive and have important legal and fiscal implications (the topics handled are sometimes without precedent and require independent research, in-depth study, and novel solutions).
- Expert knowledge and skill in applying the principles, practices, and methods of program analysis to determine whether policies and program designs are in conformance with Congressional intent and overall Administration policy.
- Expert knowledge of legislative, regulatory and policy issues concerning MF Housing and their relation to overall housing policies in order to develop policy options and proposal.
- Expert knowledge of organization, programs, missions, and functions of the Office of MF Housing in order to evaluate and recommend ways to improve the organization's effectiveness and efficiency.
- Expert knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness and efficiency of MF Housing programs.
- Knowledge of automated systems and their application to the program analysis field and program analysis ability to analyze quantitative data and prepare technical reports, analyses and guidance.
- Skill in preparing policy papers and staff reports and skill in delivering briefings to managers to encourage acceptance of findings and recommendations in complex technical areas.
- Skill in interpreting and applying complex legislative, policy and regulatory decisions to develop policies and guidance.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor provides overall and general direction with assignments in terms of public housing mission requirements. The incumbent works with supervisor in developing goals, tasks, and deadlines; takes the initiative in identifying and assuming responsibility for major assignments; coordinates effort with other concerned parties both within and outside HUD, usually resolving differences without assistance; represents MF Housing to external organizations and individuals, and handles difficult tasks requiring considerable skill and judgment with minimal supervisory involvement; and maintains workflow with minimal involvement of supervisor. Completed projects typically can be sent from the Division with

minimal reviews. Tasks involving complex issues with significant policy implications are reviewed for effectiveness in carrying out program and Departmental objectives.

FACTOR 3 - GUIDELINES

The incumbent is responsible for developing MF Housing policies on complex and controversial issues with national scope, which necessitates sound judgment, insight and imagination in resolving unique situations through innovative means. The incumbent is recognized as an authority in a broad range of MF Housing issues, and on statistical analysis and evaluative survey methodologies. In some cases, existing principles must be modified or expanded to deal with changing circumstances. In most instances there are few or no guidelines and the standards must be created. The incumbent must also develop new approaches to address important issues as they arise, foreseeing and avoiding potential problems. Policies and recommendations must be legally correct and promote the Department's goals.

FACTOR 4 - COMPLEXITY

Assignments and issues handled are diverse and numerous, covering any and all MF Housing programs. They are multifaceted and difficult, frequently involving the interaction of programs which were designed as separate entities and do not easily mesh. The issues often involve situations that are at the forefront of public attention; at other times, they are obscure matters whose early resolution can prevent them from becoming wider concerns. This might include, for example, issues involving alternative methods for financing public housing capital needs (bonds, loan guarantees, etc.). A number of the problems encountered are comprehensible only with painstaking effort and are understood only by a limited number of people. Detailed study and careful analysis may be needed in approaching them, and a variety of techniques may have to be applied to resolve them. Novel solutions are needed to most of the problems, and may have to be adaptable to rapidly changing circumstances. Decisions involving what needs to be done always include the exercise of sound judgment.

FACTOR 5 - SCOPE AND EFFECT

Work products are essential to the operation of the MF Housing programs and are used nationally by HUD offices and multifamily stakeholders. The incumbent works in an environment having maximum potential impact on persons served by the MF Housing programs and effect on the major policy directions of the Department.

Supervisory Risk Management Specialist (Deputy Director)

GS-1101-14

INTRODUCTION

This position is located in the Office of Multifamily Housing Programs, Office of Asset Management & Portfolio Oversight's Multifamily Risk Management Division. The incumbent serves as the Deputy Director in the Multifamily Risk Management Division and is responsible for the activities and workload assignments to the Management Analysts within the Division under his/her supervision. The incumbent is considered a subject matter expert on managing counterparty risk and for overseeing portfolio risk assessments and watchlist monitoring within the Division.

The position requires significant knowledge of commercial real estate finance, multifamily development, as well as asset management of a variety of FHA multifamily housing programs. The incumbent must possess detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination and servicing of FHA-insured multifamily mortgage loans. The incumbent should also possess knowledge of the Low Income Housing Tax Credit Program, Section 8 Rental Assistance and other HUD subsidy programs. The incumbent should have knowledge of the Section 202/811 Capital Advance Grant programs and skills in assessing and mitigating risk. The incumbent serves as the principal advisor to the Division Director and Office Director. The incumbent must be able to conduct investigations and make recommendations to senior management involving various HUD program areas.

MAJOR DUTIES AND RESPONSIBILITIES

- Serves as a subject matter expert for Multifamily Hubs, Satellite Offices and HUD senior management, to provide advice and guidance on matters pertaining to developing and tracking multifamily's WatchList covering insured, non-insured, and assisted properties.
- Serves as a primary focal point for coordinating technical or programmatic issues related to specific transactions and portfolio oversight.
- Serves as the leader of the Sustaining Our Investment initiative continuing education and support to HUD Field and Headquarters staff.
- Responsible for oversight and coordination between Multifamily Risk Management Division and other Divisions and offices, including OGC, DEC, Development, OAHF, Office of Evaluation, and Program Systems and Support.
- Exercises supervisory oversight and responsibility for Division staff. Supervises teams that assist and advise field staff and other professionals to meet HUD requirements.
- Serves as a principal technical resource staff person for Multifamily Hub and Program Center and HUD senior management, to provide advice and guidance on matters pertaining to counterparty risk and Lender Quality and Monitoring (LQM).
- Represents HUD in meetings, training, industry outreach, and similar activities with lenders and other industry partners, and other governmental entities.
- Responsible for ensuring HUD's deadlines are met, assuring that workload is prioritized and scheduled, data and automated reporting systems are maintained so that work can

be tracked and analyzed, and provide accurate and timely reporting of operations and activities. Incumbent makes adjustments to operations when necessitated.

- Develops and maintains internal management controls to prevent waste, fraud, program abuse and mismanagement, and manages responses to Inspector General and other audit reports.
- Responsible for supervisory and staff compliance with all Federal employment rules, regulations, and standards including but not limited to mandatory training, non-discrimination, information security, privacy considerations, and personnel management requirements.

FACTOR LEVELS

FACTOR 1 –KNOWLEDGE REQUIRED

- Overall knowledge of HUD Housing regulations and program functions, and contracting and funding procedures. Expert knowledge of Multifamily Housing's structure, mission, policies, programs, functions, and their organizational relationships.
- Expert knowledge in Multifamily's Sustaining Our Investment (SOI) principals and process and ability to oversee training activities either for new staff or refresher courses as needed.
- Skill in monitoring work operations to evaluate results, identifies problem areas, and makes improvements regarding program performance.
- Knowledge of management information systems and automated programs for data analysis.
- Ability to give oral and written presentations and deal with the public and government officials on complex or sensitive issues.
- Ability to direct and coordinate the work of a subordinate staff to accomplish goals and meet deadlines while applying sound personnel management and equal opportunity principles and practices.
- Knowledge of the Union Contract and ability to deal with diverse parties in order to develop rapport and negotiate effectively to resolve conflicts.
- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for origination of new construction, substantial rehabilitation, refinancing and acquisition of existing market rate or subsidized apartments, and restructuring mortgage debt for multifamily distressed or subsidized housing. Knowledge of real estate appraisal, title surveys, environmental reviews, property condition assessments, and mortgage restructuring practices.
- Ability to direct and coordinate the work of subordinate staff to accomplish goals and meet deadlines while applying sound personal management and equal opportunity principles and practices. Knowledge of Union Contract(s) and the ability to deal with diverse parties in order to develop rapport and negotiate effectively to avoid, and where necessary resolve, conflicts.
- Knowledge of work and task distribution to improve efficiency in Underwriting program activities and operations.

- Expert understanding of how HUD's mortgage insurance program is administered and the principles of underwriting utilizing practices and procedures common to organizations in the field of real estate lending.
- Ability to determine if Underwriting program activities are appropriate, evaluate them for their efficiency and determine how to design/redesign them to meet the program's mission, goals, and risk management standards.
- Ability to communicate effectively on technical subjects both orally and in writing.
- Expert skill in applying the full range of multifamily real estate lending and appraisal techniques and risk-rating criteria required in order to determine if a loan to a property owner secured by real property can be insured by the Federal Housing Administration.

FACTOR 2 – SUPERVISORY CONTROLS

The incumbent reports directly to the Multifamily Risk Management Division Director. The incumbent is considered an expert in the field of multifamily portfolio assessment and is expected to independently carry out assigned duties with completeness, accuracy, and mature professional judgment. The incumbent receives only general direction and has wide latitude in directing and managing areas within their responsibility throughout their jurisdiction, and thus must be able to exercise a high degree of independent, sound and seasoned judgment in order to achieve goals and objectives in a manner consistent with agency standards and practice.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to deal with unique or controversial issues. The incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application in resolving jurisdictional problems, conflicts and issues.

FACTOR 4 – COMPLEXITY

The incumbent of this position requires the application of an advanced practical knowledge of HUD multifamily housing and must make sound decisions and judgments on a variety of complex problems. The incumbent must apply knowledge, reason and logic commensurate with his her grade to arrive at a reasonable, workable and good decision. Incumbent must be able to work effectively with all levels of the office staff in order to promote harmonious cooperation throughout the jurisdiction of the Hub.

FACTOR 5- SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of FHA and Housing development program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level for the multifamily real estate financing pipeline and portfolio. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities. The incumbent has extensive working relationships with people doing business with the Department such as sponsors, contractors, architects, mortgagees, mortgagors, resident organizations, and local government officials, and must use a high degree of tact in his her contacts and professional judgment.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are to advise on multifamily housing programs and policies; exchange information, resolve differences, and serve to enhance Department public relations. Frequently, compromise solutions or positions must be reached.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effects may be required.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

DRAFT

OFFICE OF MULTIFAMILY PRODUCTION

Senior Production Advisor

GS-1101-15

INTRODUCTION

The position is located in the Office of Multifamily Production in HUD Headquarters. The Office is responsible for the program management and operational aspects of field support and liaison with Multifamily Production staff in Field Office Hubs and Program Centers. The incumbent is a senior technical expert and program manager, with responsibility for overall programmatic oversight and expertise more than one technical specialties including underwriting, mortgage credit, valuation, architecture engineering and cost, environmental, construction loan management, or oversight, regulation, counterparty and risk management of lenders. The incumbent serves as a primary point of contact for other HUD Headquarters and Field Office staff and managers, external agencies, and industry representatives, for one or several program areas, technical specialties, or major Departmental initiatives. He she provides providing authoritative guidance and oversight of FHA multifamily insured and HUD assisted programs, and may perform supervisory duties.

The position requires a mastery of various HUD Multifamily Production programs. In carrying out his her other assignments, the incumbent has latitude to interact and negotiate with staff in other offices at the Deputy Assistant Secretary level or lower. He she serves as a Multifamily representative on any inter-HUD or inter-agency task force groups consisting of staff at these levels, and in responsible for program administration and coordination with impact across cylinders or that directly interface with senior HUD management officials. The incumbent is considered an authoritative source of information and guidance within the industry and HUD organization in matters related to FHA mortgage insurance and related HUD assisted programs. A detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination, underwriting, approval, and servicing of FHA-insured multifamily mortgages, as well as the Risk Share and Project Based Section 8 programs is required. It also requires a strong working knowledge of the Low Income Housing Tax Credit Program (which is overseen by the IRS and states' housing finance agencies) in order to advance FHA insurance activity for projects financed with both Housing Tax Credits and FH-insured debt. The position requires technical and programmatic expertise so as to make policy and program oversight decisions, lead teams conducting research, and making fact specific determinations, recommendations, and investigations that involve these program areas.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's duties include a wide range of responsibilities related to management and oversight of matters covered by the Office as well as providing guidance and advice to other HUD Headquarters and Field Office staff. Provides programmatic and technical leadership, including oversight of analysis, support, design and development of procedures and policies to oversee and implement various Multifamily mortgage insurance and assistance programs. The

incumbent applies extensive knowledge and mastery of one or more of the technical disciplines (construction, architecture engineering and cost, appraisal) as well as underwriting and program areas (mortgage credit, underwriting, and programmatic policy expertise), development and management concepts and principles, methods and practices. The position requires broad experience in various functions, a full and in-depth understanding of HUD Asset Production, financing and lending principles, as well as a working knowledge of Asset Management, procedures and guidelines, and government contracting and budget processes. The incumbent is relied on by senior management to negotiate resolution of controversial or sensitive disagreements between other Offices within HUD, external government entities, or industry groups, which impact Multifamily Production operations.

Specific duties and responsibilities include oversight and performance for particularly complex, sensitive, or controversial issues of the following:

- Serves as technical resource staff person and team leader for a Division Director within the Office of Multifamily Production. Provides advice and guidance on matters pertaining to statutory and regulatory requirements and other administrative directives. Prepares and develops policy, guidelines, procedures and regulations to provide field offices with guidance on covered areas, or to respond to statutory or industry changes or identified problems
- Resolves particularly complex or controversial individual transactional or programmatic issues and interprets regulatory and policy issues.
- Serves as the point of contact with representatives of the industry, Federal, state and local government agencies, congressional interests, other external organizations and higher authorities. Prepares and presents, or assists in presentations, at industry meetings (e.g. MBA, NAHB). Leads and mentors junior staff.
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Plans and prepares contract documents related to performance or implementation of Multifamily Production or related program initiatives.
- Originates correspondence to address inquiries from lenders, industry, field offices, members of Congress, and individual members of the public which require sophisticated analysis and responses about complex issues.
- Provides support in the context of waivers, appeals, loan approval, and technical or programmatic issues. Evaluates and oversees third party contract management and assigns, reviews and analyzes, coordinates and reconciles complex third party reports such as appraisals and environmental assessments. Reviews transaction appeals, waivers, or loan approval requests in detail, identifying weaknesses, if any, confirming internal consistency of findings, and comparing findings with those of other sources, if any. Analyzes creditworthiness of key principals and production team members, the financial projections reviews project's operating budgets against applicable HUD database information, industry or local standards, and expenses of other comparable projects. Analyzes the proposed sources and uses of funds, and tests and confirms that

all FHA underwriting standards, such as loan to value ratios and debt service coverage ratios are achieved.

- Evaluates performance of lenders and third parties in coordination with Lender Qualification and Monitoring Division, Office of Risk Management, Asset Management, the Office of Inspector General, Mortgagee Review Board, and other offices within or outside of HUD.
- Conducts and directs the development of technical training and instructional material to assist HUD Field Office personnel and industry representatives.
- Oversees, analyzes, monitors data systems, reporting, procurement, funding control, training, audit responses, and budget authority requests and tracking in support of Multifamily Production activities.

FACTOR LEVELS

FACTOR 1 – KNOWLEDGE REQUIRED

General knowledge of:

- Multifamily Housing's Programs, structure, mission, policies, functions, and their organizational relationships.
- Work and task distribution to improve efficiency of policy and program support and operations.
- Analytical and evaluative methods for real estate finance.

Expert knowledge of more than one of the following specialized areas:

- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for restructuring mortgage debt for multifamily subsidized housing.
- Commercial Multifamily Real Estate Appraisal.
- Architecture, Engineering and Cost, property condition assessments,
- Real Estate and business law including securitization, Title and survey requirements.
- Environmental review, analysis and requirements.
- Mortgage Credit and Financial Analysis.
- Risk Management and Asset Management.
- Tax Credit and other HFA or local agency administered financing programs.

FACTOR 2 – SUPERVISORY CONTROLS

- The incumbent is under the general supervision of the Division Director, and may also work under the guidance of a Senior Multifamily Production specialist or Senior Production Advisor. The incumbent schedules and carries out projects concerned with planning, coordination, implementation, analysis, and evaluation of underwriting, technical, or programmatic initiatives for Multifamily Housing Production, and is accountable for quality and timeliness of completed project deliverables and work product.

- Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organization goals, guidelines, and effectiveness in achieving intended objectives.
- The incumbent is considered a technical expert in the field of underwriting and is responsible for independently implementing underwriting tasks and long-term assignments and projects. The incumbent must be able to exercise a high degree of independent, sound and seasoned judgment.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to issues and problem studies. Within the context of broad regulatory guidelines, the incumbent may redefine or develop more specific guidelines or methods for the implementation of program support activities, programs or methods, and improve the effectiveness in the administration of such activities.

The incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application.

FACTOR 4 – COMPLEXITY

Assignments require detailed plans and goals for implementing a specific program strategy and/or developing criteria to evaluate the effectiveness of a given approach or set of procedures. Assignment requires independent research, assessing many issues, and then developing a proposed course of action as the result of reviewing various alternatives. Success in execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate, and perform various complex and difficult tasks.

The work requires the selection and use of different analytical techniques, methods, and procedures in analyzing, revising, and formulating underwriting recommendations that meet program goals, objectives, and timetables. The incumbent is required to exercise considerable judgment in the selection, interpretation, and application of guidelines; in meeting timetables and dealing with others; and ensuring that the myriad of laws, rules and regulations concerning subsidized housing, financial transactions, and real estate appraisal are integrated in the underwriting process.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of Underwriting program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining or clarifying information, gathering facts, resolving issues, coordinating and devising new or revised program strategies for Multifamily Underwriting systems or programs. There may be some degree of controversy involved in the process of influencing others to accept ideas.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effects maybe required.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

DRAFT

Production Specialist

GS-1101-11/12/13

INTRODUCTION

The position is located in the Officer of Multifamily Production in HUD Headquarters. The Office is responsible for the program management and operational aspects of field support and liaison with Multifamily Production staff in Field Office Hubs and Program Centers. The position is structured to accommodate a career path. At the GS-13 journeyman level, the position requires a mastery of various HUD Multifamily Production programs, and a detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination, underwriting, approval, and servicing of FHA-insured multifamily mortgages, as well as the Risk Share and Project Based Section 8 programs. It also requires a strong working knowledge of the Low Income Housing Tax Credit Program (which is overseen by the IRS and states' housing finance agencies) in order to advance FHA insurance activity for projects financed with both Housing Tax Credits and FH-insured debt. The position requires technical and programmatic expertise so as to make policy and program oversight recommendations, conduct research, and make fact specific determinations, recommendations, and investigations that involve these program areas. At the GS-11, and 12 levels, the Specialist will have expertise in specific program or technical disciplines, and demonstrate progressive mastery of several areas of responsibility.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent provides programmatic and technical analysis, support, design and development of procedures and policies to oversee and implement various Multifamily mortgage insurance and assistance programs. He she is responsible for managing, coordination and accomplishment of planning, scoping, development design of initiatives necessary for the efficient and effective operation of FHA multifamily insured, capital advance, and rental assistance programs. The incumbent is considered a technical expert in the field of underwriting and is responsible for independently implementing underwriting tasks and long-term assignments and projects. The incumbent must be able to exercise a high degree of independent, sound and seasoned judgment.

At the journeyman level, the incumbent applies extensive knowledge of one or more of the technical disciplines (construction, architecture engineering and cost, appraisal) or underwriting and program areas (mortgage credit, underwriting, and programmatic policy expertise), development and management concepts and principles, methods and practices. The position requires broad experience in various functions, a full and in-depth understanding of HUD Asset Production, financing and lending principles, as well as a working knowledge of Asset Management, procedures and guidelines, and government contracting and budget processes. The incumbent serves as a point of contact for other HUD Headquarters and Field Office staff and managers, external agencies, and industry representatives, providing authoritative guidance in interpreting outstanding policy and technical guidance for FHA multifamily insured and HUD assisted programs.

Specific duties and responsibilities include the following:

- Serves as technical resource staff person for Multifamily Production Division Director, to provide advice and guidance on matters pertaining to statutory and regulatory requirements and other administrative directives. Prepares and develops policy, guidelines, procedures and regulations to provide field offices with guidance on covered areas.
- Resolves individual transactional or programmatic issues and interprets regulatory and policy issues.
- Serves as the point of contact with representatives of the industry, Federal, state and local government agencies, congressional interests, other external organizations and higher authorities. Prepares and assists in presentations at industry meetings (e.g. MBA, NAHB).
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Originates correspondence to address inquiries from lenders, industry, field offices, members of Congress, and individual members of the public which require sophisticated analysis and responses about complex issues.
- Provides support in the context of waivers, appeals, loan approval, and technical or programmatic issues. Evaluates and oversees third party contract management and assigns, reviews and analyzes, coordinates and reconciles complex third party reports such as appraisals and environmental assessments. Reviews transaction appeals, waivers, or loan approval requests in detail, identifying weaknesses, if any, confirming internal consistency of findings, and comparing findings with those of other sources, if any. Analyzes creditworthiness of key principals and production team members, the financial projections reviews project's operating budgets against applicable HUD database information, industry or local standards, and expenses of other comparable projects. Analyzes the proposed sources and uses of funds, and tests and confirms that all FHA underwriting standards, such as loan to value ratios and debt service coverage ratios are achieved.
- Evaluates performance of lenders and third parties in coordination with Lender Qualification and Monitoring Division, Office of Risk Management, Asset Management, the Office of Inspector General, Mortgagee Review Board, and other offices within or outside of HUD. Conducts and directs the development of technical training and instructional material to assist HUD Field Office personnel and industry representatives.

- Provides technical analysis including position or option papers on various program and technical areas, including specialized problem areas of a priority nature. Monitors, tracks, and is responsible for Policy Production including various compliance with Administrative Clearance, Paperwork Reduction Act and similar requirements.
- Oversees, analyzes, monitors data systems, reporting, procurement, funding control, training, audit responses, and budget authority requests and tracking in support of Multifamily Production activities, compliance with credit reform and budget policy.

FACTORS

FACTOR 1 – KNOWLEDGE REQUIRED

General knowledge of:

- Multifamily Housing's Programs, structure, mission, policies, functions, and their organizational relationships.
- Work and task distribution to improve efficiency of policy and program support and operations.
- Analytical and evaluative methods for real estate finance.

Expert knowledge of more than one of the following specialized areas:

- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for restructuring mortgage debt for multifamily subsidized housing.
- Commercial Multifamily Real Estate Appraisal.
- Architecture, Engineering, Cost, Construction management, property condition assessments.
- Real Estate and business law including securitization, Title and survey requirements.
- Environmental review, analysis and requirements.
- Mortgage Credit, Construction Loan Administration, and Financial Analysis.
- Risk Management and Asset Management.
- Tax Credit and other HFA or local agency administered financing programs.

FACTOR 2 – SUPERVISORY CONTROLS

The incumbent is under the general supervision of the Division Director, and may also work under the guidance of a Senior Multifamily Production specialist or Senior Production Advisor. The incumbent schedules and carries out projects concerned with planning, coordination, implementation, analysis, and evaluation of underwriting, technical, or programmatic imitative for Multifamily Housing Production, and is accountable for quality and timeliness of completed project deliverables and work product.

Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organization goals, guidelines, and effectiveness in achieving intended objectives.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to issues and problem studies. Within the context of broad regulatory guidelines, the incumbent may redefine or develop more specific guidelines or methods for the implementation of program support activities, programs or methods, and improve the effectiveness in the administration of such activities.

Under the supervision and guidance of more senior staff and managers, the incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application.

FACTOR 4 – COMPLEXITY

Success in execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate, and perform various complex and difficult tasks. Assignments require detailed plans and goals for implementing a specific program strategy and/or developing criteria to evaluate the effectiveness of a given approach or set of procedures. Assignment requires independent research, assessing many issues, and then developing a proposed course of action as the result of reviewing various alternatives.

The work requires the selection and use of different analytical techniques, methods, and procedures in analyzing, revising, and formulating underwriting recommendations that meet program goals, objectives, and timetables. The incumbent is required to exercise considerable judgment in the selection, interpretation, and application of guidelines; in meeting timetables and dealing with others; and ensuring that the myriad of laws, rules and regulations concerning subsidized housing, financial transactions, architecture, engineering, cost, environmental, and real estate appraisal, are integrated in the underwriting process.

FACTOR 5- SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of FHA multifamily mortgage insurance and other housing production program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level, and affects the plans, goals, and effectiveness of missions and programs at various echelons or locations within HUD. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities. Contacts may be initiated by the specialist and may be frequent and recurring.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining or clarifying information, gathering facts, resolving issues, coordinating and devising new or revised program strategies, to present alternative approaches and view points, and to influence managers and other officials to accept and implement recommendations. It requires tact and negotiating skills.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, accomplished while seated at a desk, or working with files. No special physical effects are required to perform the work.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

DRAFT

Senior Production Specialist

GS-1101-14

INTRODUCTION

The position is located in the Office of Multifamily Production in HUD Headquarters. The Office is responsible for the program management and operational aspects of field support and liaison with Multifamily Production staff in Field Office Hubs and Program Centers. The incumbent is a senior technical expert in both programmatic oversight and more than one technical specialties including underwriting, mortgage credit, valuation, architecture engineering and cost, environmental, construction loan management, or oversight, regulation, counterparty and risk management of lenders. The incumbent serves as a point of contact for other HUD Headquarters and Field Office staff and managers, external agencies, and industry representatives, providing authoritative guidance in interpreting outstanding policy and technical guidance for FHA multifamily insured and HUD assisted programs.

The position requires a mastery of various HUD Multifamily Production programs. The incumbent is considered an authoritative source of information and guidance within the industry and HUD organization in matters related to FHA mortgage insurance and related HUD assisted programs. A detailed practical knowledge of a wide range of HUD/FHA Multifamily policies and procedures for the origination, underwriting, approval, and servicing of FHA-insured multifamily mortgages, as well as the Risk Share and Project Based Section 8 programs is required. It also requires a strong working knowledge of the Low Income Housing Tax Credit Program (which is overseen by the IRS and states' housing finance agencies) in order to advance FHA insurance activity for projects financed with both Housing Tax Credits and FH-insured debt. The position requires technical and programmatic expertise so as to make policy and program oversight decisions, lead teams conducting research, and making fact specific determinations, recommendations, and investigations that involve these program areas. In carrying out his her other assignments, the incumbent has latitude to interact and negotiate with staff in other offices at the Deputy Assistant Secretary level or lower. He she serves as a Multifamily representative on any inter-HUD or inter-agency task force groups consisting of staff at these levels.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent's duties include a wide range of responsibilities related to management and oversight of matters covered by the Office as well as providing guidance and advice to other HUD Headquarters and Field Office staff. Provides programmatic and technical analysis, support, design and development of procedures and policies to oversee and implement various Multifamily mortgage insurance and assistance programs. The incumbent applies extensive knowledge and mastery of one or more of the technical disciplines (construction, architecture engineering and cost, appraisal) as well as underwriting and program areas (mortgage credit, underwriting, and programmatic policy expertise), development and management concepts and principles, methods and practices. The position requires broad experience in various functions, a full and in-depth understanding of HUD Asset Production, financing and lending

principles, as well as a working knowledge of Asset Management, procedures and guidelines, and government contracting and budget processes.

Specific duties and responsibilities include the following:

- Serves as technical resource staff person and team leader for a Division Director within the Office of Multifamily Production. Provides advice and guidance on matters pertaining to statutory and regulatory requirements and other administrative directives. Prepares and develops policy, guidelines, procedures and regulations to provide field offices with guidance on covered areas, or to respond to statutory or industry changes or identified problems.
- Resolves particularly complex or controversial individual transactional or programmatic issues and interprets regulatory and policy issues.
- Serves as the point of contact with representatives of the industry, Federal, state and local government agencies, congressional interests, other external organizations and higher authorities. Prepares and presents, or assists in presentations, at industry meetings (e.g. MBA, NAHB). Leads and mentors junior staff.
- Develops and originates necessary changes to regulations and administrative publications to assure program or operational viability.
- Plans and prepares contract documents related to performance or implementation of Multifamily Production or related program initiatives.
- Originates correspondence to address inquiries from lenders, industry, field offices, members of Congress, and individual members of the public which require sophisticated analysis and responses about complex issues.
- Provides support in the context of waivers, appeals, loan approval, and technical or programmatic issues. Evaluates and oversees third party contract management and assigns, reviews and analyzes, coordinates and reconciles complex third party reports such as appraisals and environmental assessments. Reviews transaction appeals, waivers, or loan approval requests in detail, identifying weaknesses, if any, confirming internal consistency of findings, and comparing findings with those of other sources, if any. Analyzes creditworthiness of key principals and development team members, the financial projections reviews project's operating budgets against applicable HUD database information, industry or local standards, and expenses of other comparable projects. Analyzes the proposed sources and uses of funds, and tests and confirms that all FHA underwriting standards, such as loan to value ratios and debt service coverage ratios are achieved.

- Evaluates performance of lenders and third parties in coordination with Lender Qualification and Monitoring Division, Office of Risk Management, Asset Management, the Office of Inspector General, Mortgagee Review Board, and other offices within or outside of HUD. Conducts and directs the development of technical training and instructional material to assist HUD Field Office personnel and industry representatives.
- Oversees, analyzes, monitors data systems, reporting, procurement, funding control, training, audit responses, and budget authority requests and tracking in support of Multifamily Production activities.

FACTORS

FACTOR 1 – KNOWLEDGE REQUIRED

General knowledge of:

- Multifamily Housing's Programs, structure, mission, policies, functions, and their organizational relationships.
- Work and task distribution to improve efficiency of policy and program support and operations.
- Analytical and evaluative methods for real estate finance.

Expert knowledge of more than one of the following specialized areas:

- Comprehensive knowledge of underwriting principles and practices, including underwriting requirements for restructuring mortgage debt for multifamily subsidized housing.
- Commercial Multifamily Real Estate Appraisal.
- Architecture, Engineering and Cost, property condition assessments,
- Real Estate and business law including securitization, Title and survey requirements.
- Environmental review, analysis and requirements.
- Mortgage Credit and Financial Analysis.
- Risk Management and Asset Management.
- Tax Credit and other HFA or local agency administered financing programs.

FACTOR 2 – SUPERVISORY CONTROLS

The incumbent is under the general supervision of the Division Director, and may also work under the guidance of a Senior Multifamily Production specialist or Senior Production Advisor. The incumbent schedules and carries out projects concerned with planning, coordination, implementation, analysis, and evaluation of underwriting, technical, or programmatic initiatives for Multifamily Housing Production, and is accountable for quality and timeliness of completed project deliverables and work product.

Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organization goals, guidelines, and effectiveness in achieving intended objectives.

The incumbent is considered a technical expert in the field of underwriting and is responsible for independently implementing underwriting tasks and long-term assignments and projects. The incumbent must be able to exercise a high degree of independent, sound and seasoned judgment.

FACTOR 3 – GUIDELINES

Guidelines used include Federal Statutes, HUD handbooks and directives, and state and local government guidelines. Guidelines require considerable adaptation and or interpretation for applications to issues and problem studies. Within the context of broad regulatory guidelines, the incumbent may redefine or develop more specific guidelines or methods for the implementation of program support activities, programs or methods, and improve the effectiveness in the administration of such activities.

The incumbent must exercise a high degree of judgment and discretion in applying these guidelines. Available guidelines do not conform to all situations, requiring the incumbent to exercise sound and seasoned judgment in their interpretation, modification, and application.

FACTOR 4 – COMPLEXITY

Assignments require detailed plans and goals for implementing a specific program strategy and/or developing criteria to evaluate the effectiveness of a given approach or set of procedures. Assignment requires independent research, assessing many issues, and then developing a proposed course of action as the result of reviewing various alternatives. Success in execution of the tasks is dependent upon the incumbent's ability to initiate, direct, coordinate, and perform various complex and difficult tasks.

The work requires the selection and use of different analytical techniques, methods, and procedures in analyzing, revising, and formulating underwriting recommendations that meet program goals, objectives, and timetables. The incumbent is required to exercise considerable judgment in the selection, interpretation, and application of guidelines; in meeting timetables and dealing with others; and ensuring that the myriad of laws, rules and regulations concerning subsidized housing, financial transactions, and real estate appraisal are integrated in the underwriting process.

FACTOR 5 - SCOPE AND EFFECT

The purpose of the work is to achieve the goals and objectives of the Department as mandated by the Assistant Secretary for Housing, Federal Housing Commissioner and to develop, plan, coordinate, initiate, monitor, and evaluate the effectiveness of Underwriting program efforts for Multifamily Housing. Such work involves a focus on the monitoring of program effectiveness at the operating level. The work contributes to providing a proper and affordable housing market.

FACTOR 6 – PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors throughout the HUD organization, personnel and officials from other Federal, state and local agencies, professionals of lending institutions, and other commercial entities.

FACTOR 7 – PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining or clarifying information, gathering facts, resolving issues, coordinating and devising new or revised program strategies for Multifamily Underwriting systems or programs. There may be some degree of controversy involved in the process of influencing others to accept ideas.

FACTOR 8 – PHYSICAL DEMANDS

The work is primarily sedentary, although some slight physical effects may be required.

FACTOR 9 – WORK ENVIRONMENT

The work is performed in an office environment.

DRAFT

OFFICE OF RECAPITALIZATION

Housing and Neighborhood Transformation Division Director

GS-1101-15

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. Preservation efforts will include the development and execution of restructuring/recapitalization agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring/recapitalization of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation.

Many of the Office of Recapitalization efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs), Public Housing Authorities and other parties who are responsible for the initial evaluation, as assigned by the Office of Recapitalization, of affordable housing and like projects with the purpose of proposing plans to the Recapitalization Office and other stakeholders for long term preservation. In addition, the Recapitalization Office and the Housing and Neighborhood Transformation Division will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation, including efforts to improve and transform surrounding neighborhoods where recapitalization transactions are completed, to meet local needs through community development planning. In conducting the business of preservation of affordable housing, the Recapitalization Office is responsible for ensuring compliance with relevant laws and statutes.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is responsible for managing and overseeing the activities of the assigned portfolio, for ensuring effective management of the restructuring/recapitalization process, and for resolving disputes as they arise. The incumbent has broad responsibility for overseeing a full range of restructuring, refinancing, and conversion of rental assistance. To carry out his or her responsibilities, the incumbent manages a Division composed of subordinate supervisors, Loan Underwriters, Recapitalization specialists, Transaction Managers, facilitators, other support staff, and external consultants as may be necessary. In exceptional circumstances, the incumbent will be responsible for processing individual restructuring/recapitalization transactions when no additional assistance is available. The incumbent operates within the purview of his her delegated authority and by applicable provisions of law and general polices.

The incumbent will implement and direct other preservation programs undertaken by the Office of Recapitalization, as well as act in an advisory capacity as needed in the development of new preservation activities.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: Responsible for the long and short term planning, development, management, coordination, and implementation of all operational programs, policies and procedures. These duties include current preservation responsibilities and new programs as assigned to the Office of Recapitalization by the Office of Housing. Plans and directs the day-to-day activities of all field operations within the servicing area through a subordinate staff consisting of: Loan Underwriters, HUD Facilitators, Coordinators; other support staff, and external consultants, as needed.

Effect: Performs managerial and supervisory duties within the limitations of and in accordance with agency-wide delegations of authority, applicable administrative law, financial guidelines, established policies, and regulations. This includes:

- Determining the eligibility of projects for mortgage debt restructuring, recapitalization, and community development, assessing the capacity of the Office of Recapitalization to develop and oversee the implementation of restructuring/recapitalization plans, and reviewing and approving mortgage debt restructuring/recapitalization and community development plans on a project-by-project basis.
- Responsible for enforcing the legal requirements for the closing of restructuring transactions, including the requirements pertaining to FHA mortgage insurance, as needed, and ensuring that proper asset management capabilities are in place in accordance with the requirements of long-term regulatory and other agreements after the restructuring/recapitalization has occurred.
- Responsible for reviewing and approving expense reimbursements and payment invoices from third parties operating under contractual relations with the Office of Recapitalization. Responsible for establishing and maintaining an effective system of internal controls to prevent the occurrence of fraud, waste and abuse, including the creation and maintenance of record keeping and documentation. Responsible for conducting periodic compliance reviews of PAEs, including site visits, to ensure that all policies and procedures required by Office of Recapitalization are properly and efficiently carried out.
- Responsible for ensuring that management information, including information originating with outside parties is provided to Office of Recapitalization management information system manager in a timely, accurate and complete fashion.

FACTOR 2 - ORGANIZATIONAL SETTING

Responsible for providing training to Division staff, and for contributing to the development of training materials and the evaluation of training programs. Responsible for interacting with responsible officials in other HUD offices to ensure timely and appropriate actions, as needed, to consummate restructuring transactions in accordance with the applicable rules and regulations of those offices.

Establishes goals and objectives for program operations in accordance with policy guidance and initiatives for the Office of Recapitalization. Provides corresponding managerial oversight and guidance to Division staff.

Recommends sound business initiatives to minimize the costs to HUD, the decline in affordable housing opportunities, the impact on special need tenants, and or the financial loss to the FHA insurance funds. Responsible for initiating innovative strategies to improve the conduct of these activities.

Submits written reports and recommendations for action to the ADAS for review and approval. Performs a full range of managerial duties and special projects, as needed.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

- Advises ADAS as well as subordinate management on such areas as policy planning, implementing and monitoring formal and on-the-job training efforts; making broad assignments; making technical decisions on work problems referred by subordinates supervisors; hearing employee problems and complaints not resolved at lower levels; and resolving disciplinary problems.
- Exercises all delegated authority over the planning, direction and execution of regulations responsible for HUD's restructuring/recapitalization of loans/projects to support assisted Housing rents. Plans and assigns the work of subordinate supervisors, setting priorities and schedules.
- Interviews candidates, recommends and approves appointments, promotions, reassignments.
- Resolves complaints unresolved at a lower level. Enacts disciplinary measures adverse actions based on performance and conducts training.
- Develops and applies performance standards.
- Coordinates, directs, oversees all work of subordinate supervisors and subordinates.

- Represents the Office of Recapitalization to other organizations, including stakeholders.
- Makes supervisory and non-supervisory selections.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts

Represents the Office of Recapitalization in meetings with executive level officials of HUD, media, politicians, consultants, and other organizations with regard to program planning, projects, meetings, or other preservation issues of importance and relevance to the Office of Recapitalization.

Responsible for interacting with local officials, tenant organizations and other members of the public and for accurately and fairly representing the goals and activities of the restructuring of program, as needed.

Established and maintains continuing liaison with counterparts in other Divisions, as well as in HUD, FHA, and other Federal agencies, and with representatives of state and local HFAs.

Attends and contributes to conferences with other Office of Recapitalization officials, officials from other Federal agencies, staff from state and local HFAs, PAEs participating in Office of Recapitalization's restructuring program, and representatives from project owners, mortgage lenders and loan servicers, tenants, and community action groups on extremely complex and sensitive matters.

Represents the Office of Recapitalization to regional and national officers of public interest groups, large regional and national associations of multifamily and assisted Housing owners, PHAs, local governments, and community development organizations giving formal briefings. Represents the Office of Recapitalization Office to housing owners and PHAs.

Sub-factor 4B - Purpose of Contacts

The purpose of contacts is to motivate reluctant owners to enter into the various HUD programs. Responsible for evaluating the potential for conflicts of interest among parties involved in the Restructuring/recapitalization process and resolving disagreements between owners and others involved in the restructuring/recapitalization process. Contacts with executive level HUD officials, congressional committees, national offices of public interest groups are to build support for the program and increase the flux of reluctant applicants.

Contacts with owners, Public Housing Authorities, HUD officials and all stakeholders are to ensure proper referral and eligible projects to the Office of Recapitalization for preservation, under existing responsibilities and new preservation activities.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized. Technical experts supervised by this position include Financial Transaction Managers, Debt Restructuring Specialists and Analysts and Underwriters. The base level of work performed by Transaction Managers, Specialists and Underwriters is at the GS-13 level. The base level of subordinate supervisors is at the GS-14 level.

FACTOR 6 - OTHER CONDITIONS

The incumbent oversees work performed by highly skilled professionals. The work is highly technical with a base level of work at grade 13. Supervisors have a base level of work at the GS-14 level. Preservation work affects assisted multifamily housing in every state in the union. Staff is, for the most part, recruited from industry, for technical housing structuring expertise. The program directly affects the amount of affordable low income housing in the United States.

DRAFT

Multifamily Assisted Housing Preservation Division Director

GS-1101-15

INTRODUCTION

The Multifamily Assisted Housing Preservation Division is located in the Office of Housing, Office of Recapitalization, Washington, DC. The Office of Recapitalization is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation.

In conducting the business of preservation of affordable housing, the Recapitalization Office is responsible for ensuring compliance with relevant laws and statutes.

MAJOR DUTIES AND RESPONSIBILITIES

The Division Director leads the Multifamily Assisted Housing Preservation Division in the Office of Recapitalization's Washington, DC Headquarters, and reports to the Associate Deputy Assistant Secretary, Office of Recapitalization. The incumbent interacts with staff in all Divisions and Branches in the Office of Recapitalization involved in preservation activities, HUD's Office of General Counsel, HUD's Office of Multifamily Housing, Financial Advisors (FA), and other HUD program offices, Owners and other parties to recapitalization transactions, and directs a staff of professionals in Washington, DC, to proactively develop and implement policy, and to resolve preservation blockages in the Office of Recapitalization . This includes managing subordinate supervisors and a staff of professionals, including transaction, underwriting, and policy specialists, analysis of results and identification of needs, oversight of policy development and updating, ensuring that guidance and communication materials are current, and that matters that would mitigate current issues and or enhance program operations are receiving adequate attention from the necessary staff. While the role does not have direct responsibility for completing asset restructurings or approval of mortgage prepayments and related requests, there may be occasions when the incumbent is the direct contact with owners and is leading negotiations on behalf of the Office of Recapitalization.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

The work involves directing a subordinate supervisors and staff of complex professionals and the application of difficult and complex management principles.. The activities include developing comprehensive business and strategic plans to facilitate achieving the Office of Recapitalization program objectives. Incumbent plans, analyzes, evaluates and oversees the implementation of preservation activities for multifamily assisted rental properties throughout the Recapitalization Office and ensures compliance by the staff and Housing's employees. In addition, the incumbent identifies matters that are hindering preservation and opportunities to

enhance preservation, and provides overall policy direction to resolve issues and promote efficient operations in Housing programs. The incumbent participates in discussions about preservation opportunities and designs procedures and policies for preservation activities to meet Department and Housing goals. The incumbent is responsible for working with Departmental Offices in HUD, and interacts with Office of Recapitalization Headquarters staff involving preservation activities, HUD's Office of General Counsel, HUD's Office of Multifamily Housing, Financial Advisors (FA), and other HUD program offices, and directs a staff of professionals in Headquarters to proactively develop and implement policy, and to resolve preservation blockages in the Office of Recapitalization that support and meet Departmental goals. Consequently, the work of the incumbent affects Housing headquarters and field offices in compliance with Housing policies and regulations affecting these responsibilities.

Housing programs represent a major segment of HUD and are of High interest to the public, the building and loan industries, various institutions and groups and State and Local Governments. As a consequence of such wide and intense interest, there is frequent change in the nature, scope and emphasis affecting the programs that in turn, affect Housing's operations nationwide.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the supervision and is accountable to the Associate Deputy Assistant Secretary, Office of Recapitalization, who provides only limited reviews of the activities and work products of the incumbent.

Review of the incumbents work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs. The incumbent represents the Division in meetings held within Housing and HUD and with outside parties and provides authoritative guidance on the activities of the Division.

Participates in the Office of Recapitalization Loan Committee, and may be called upon to chair Committee meetings. The incumbent acts as a general resource on all Office of Recapitalization policies and procedures; can expect to be called upon by the Office of Recapitalization to provide guidance on asset-specific matters (from referral to due diligence to underwriting to owner negotiations to closing and post-closing).

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

Advises ADAS on such areas as data analysis, policy planning, development, and implementation. Exercises all delegated authority over the planning, direction and execution of the MAHRA regulations responsible for HUD's restructuring of loans to support market assisted Housing rents, and the implementation of statutory and regulatory requirements governing the approval of prepayments of HUD Direct and insured loans under the purview of the Office of Recapitalization. Plans and assigns the work of subordinate supervisors, setting priorities and schedules, and evaluates work product. Interviews candidates, recommends and approves appointments, promotions, reassignments. Enacts disciplinary measures adverse actions based on performance and conduct. Trains internal staff,

contractors, and stakeholders on policy, procedure, and implementation issues on Mark to Market, as well as any other preservation activities or programs as assigned to or undertaken by the Office of Recapitalization. Develops and applies performance standards. Coordinates, directs, oversees all work of subordinate supervisors and subordinates.

Represents the Office of Recapitalization to other organizations, including other HUD and other Federal officials, industry stakeholders, property owners, and tenants. Directs a program that influences over half a billion dollars of FHA funding. Implements and monitors formal and on-the-job training efforts, makes broad assignments to staff, makes technical decisions on work problems referred by subordinates and supervisors, hears employee problems and complaints not resolved at lower levels, and resolves disciplinary problems.

FACTOR 4 - PERSONAL CONTACTS

NATURE OF CONTACTS:

- Represents the Office of Recapitalization in meetings with executive level officials of HUD, media, politicians, consultants, and other organizations with regard to program planning, projects, meetings, or other preservation issues of importance and relevance to the Office of Recapitalization.
- Represents the Office to regional and national officers of public interest groups, large regional and national associations of multifamily and assisted Housing owners (as well as individual owners), giving formal briefings.
- Is primary contact for HUD Multifamily Hub and Field Office Directors on matters of policy, communication and coordination.
- Educates the Office of Recapitalization, HUD, and other Federal staff, as well as external stakeholders including property owners, tenants, lenders, industry groups, and others, about policy, procedure, and results of the Mark to Market program and other multifamily housing preservation programs or activities as assigned to or undertaken by the Recapitalization Office.

PURPOSE OF CONTACTS

The purpose of contacts is to inform internal and external stakeholders of new and existing policy, procedure, results and benefits of Mark to Market and other preservation activities and programs. Contacts are also to motivate owners and or project managers to enter into the MAHRA program by submitting their multifamily Housing Assistance Contracts for restructuring. Contacts with executive level HUD officials, congressional committees, national offices of public interest groups are to build support for the program.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized; subordinate supervisors are at the grade 14 level and a number of program and many technical experts supervised by this position are at the grade 13 level.

The nature of the work is highly technical and requires the balance of competing interests. Considerations include legal aspects (all relevant statutes, regulations, rules, and policy), financial aspects (lender underwriting, due diligence, and notes closing), and public policy aspects (preservation of affordable housing balanced with physical and financial viability, local HUD office input, tenant preferences, and local governmental positions). Policy and procedure development and implementation decisions must be made in this environment.

FACTOR 6 - OTHER CONDITIONS

The incumbent directs work comparable in difficulty to the GS-13 or higher level, requiring exceptional coordination and integration of a number of very important, controversial and complex program segments of professional and or administrative work. The Division Director oversees work performed by highly skilled professionals. The work is highly technical with a number of expert staff at grades 13 and supervisors at grade 14.

Preservation work is performed at two locations and affects assisted multifamily housing in every state in the country. Staff is representative of industry and HUD, and includes technical HUD, multifamily housing, and lending expertise. The program directly affects the amount of affordable housing in the United States.

Participating Administrative Entity (PAE) Coordination Specialist

GS-1101- 13/14

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. Preservation efforts will include the development and execution of restructuring/recapitalization agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring/recapitalization of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Office of Recapitalization's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs), Public Housing Authorities and other parties who are responsible for the initial evaluation, as assigned by the Office of Recapitalization, of affordable housing and like projects with the purpose of proposing plans to the Office of Recapitalization and other stakeholders for long term preservation. In addition, the Office of Recapitalization will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation. In conducting the business of preservation of affordable housing, the Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes. The incumbent is responsible for managing and overseeing the activities of the assigned portfolio, for ensuring effective management of the restructuring/recapitalization process, and for resolving disputes as they arise. The incumbent has broad responsibility for assigning recapitalization transactions to staff in the Branch and for managing and overseeing a full range of restructuring, financial underwriting, refinancing, and other activities related to rental assistance and neighborhood revitalization. To carry out his or her responsibilities, the incumbent manages an office composed of Loan Underwriters, financial transaction managers, other support staff, and external consultants as may be necessary. In exceptional circumstances, the incumbent will be responsible for processing individual restructuring/recapitalization transactions when no additional assistance is available. The incumbent operates within the purview of his her delegated authority and by applicable provisions of law and general polices. The incumbent will implement and direct other preservation programs undertaken by the Office of Recapitalization, as well as act in an advisory capacity as needed in the development of new preservation activities.

The incumbent serves as a Participating Administrative Entity (PAE) Coordination Specialist in the Multifamily Assisted Housing Preservation Division, Mortgage Restructure Branch in Washington, DC and reports to the Director, Mortgage Restructure Branch. This position has the responsibility for planning, reviewing, analyzing, coordinating, interpreting, applying, and

making recommendations on all matters, transactions and regulations related to private sector contractors, and state and local HFAs, eligibility, selection, conflicts of interest, performance, suspension, exclusion, and termination as PAEs in the OAHP restructuring program. The incumbent also develops and implements similar and appropriate contractor oversight structures for other preservation programs and activities assigned to or undertaken by The Office of Recapitalization.

MAJOR DUTIES AND RESPONSIBILITIES

- Conducts compliance reviews and performs oversight activities of The Office of Recapitalization's actions regarding the selection and management of state and local HFAs participating as PAEs, to ensure compliance with The Office of Recapitalization's ethics regulations, implementing guidance and other procedures. These activities are conducted on a nationwide basis.
- Prepares written reports regarding these reviews, which are provided to the Mortgage Restructure branch chief and other management of the Office of Recapitalization, as necessary.
- Assists in the development, administration and revision of ethics and business regulations, standards, policies, and procedures applied to PAEs in The Office of Recapitalization's restructuring program, and applied to other contractors as necessary to support other programs and activities assigned to or undertaken by the Office of Recapitalization.
- Applies informed judgment in reviews of business-and ethics-related issues, in order to determine a prospective compliance with Office of Recapitalization regulations for participating as PAEs.
- Assists in maintaining and enforcing a high degree of confidentiality in all ethics and business matters between the Office of Recapitalization and its PAEs, due to the sensitive nature of the issues involved in awarding and administering PAE contracts.
- Provides nationwide guidance for program support activities, such as coordination with Office of Recapitalization staff in conducting PAE, HFA, and contractor evaluations, and monitoring transactional decisions for precedent and uniformity.
- Investigates facts and issues relating to PAEs' conflicts of interest and prepares recommendations for appropriate action.
- Writes, edits and updates reports, manuals, procedures, correspondence and memoranda regarding the Office of Recapitalization's PAE and contractor management process and program oversight, researches available database, takes actions to assure

information and data are correct and accurate, and responds in a timely manner by sending the completed document to the appropriate office or requesting party.

- Serves as expert resource and principal liaison with other sections on PAE issues including those of a contractual nature (the Portfolio Restructuring Agreement) which affect fundamental interests of the restructuring program..
- Makes all assignments of new property referrals coming into the mortgage restructure program. Stays abreast of overall PAE performance in order to address any perceived or real problems before new assets are assigned.
- Researches and recommends amendments to the Portfolio Restructuring Agreement, as needed, to mitigate potential problems and or to correct a deficiency and or to better align the interests of

The Office of Recapitalization and its PAEs:

- As directed, represents the Office in meetings with senior level HUD staff, as well as officials of other Federal agencies, public institutions, special interest groups, professional organizations, PAEs, and the general public on matters relating to Office regulations regarding the selection, management and performance of PAEs in the restructuring program.
- Develops, recommends to the Branch Chief, and implements eligibility, selection, management, and oversight of PAE-equivalent contractors needed to support other preservation programs and activities assigned to or undertaken by the Office of Recapitalization.
- Performs other technical and special assignments as may be required in accomplishing section responsibilities.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Broad and comprehensive knowledge of HUD, FHA, and the Office of Recapitalization, their policies and procedures, rules, regulations, and laws.
- Knowledge of the Office of Recapitalization's general operating rules and regulations should be sufficient to permit the incumbent to understand the ethical and practical issues relating to PAEs in the Office of Recapitalization's restructuring program, and other contractors supporting other preservation programs and activities.
- Experience in interpreting legal contracts and applying their terms and conditions to actual situations.

- Experience and skills in assessing and evaluating business and economic issues, including organizational and personal conflicts of interest, as they relate to contractors performing mortgage debt restructuring.
- Understanding of the restructuring process phases, including due diligence, underwriting, plan recommendation, approval, closing and post-closing to be able to apply new methods to modifying existing approaches in order to solve unprecedented problems in the HFA selection and PAE participation process.
- Ability to meet and deal with individuals to resolve complex problems; work under pressure to meet deadlines; work with complex federal regulations and laws; establish a smooth working relationship with Office personnel whose work and procedures will be reviewed and evaluated; communicate effectively, both orally and in writing, with co-workers, high-level officials and the general public; respect the confidentiality required by the nature of the incumbent's work; and perform a variety of responsibilities associated with overseeing the process for restructuring a mortgage.
- Ability to apply knowledge and skills of the restructuring program to other preservation programs and activities assigned to or undertaken by the Office of Recapitalization.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent works under the general administrative supervision of the Chief of the Mortgage Restructure Branch. The supervisor sets the overall objectives applicable to assigned programs and defines the financial and other management resources available to achieve the expected results. The program's specialized requirements and time constraints typically are developed through consultation with the supervisor and may depend on a range of conditions surfaced, assessed, and discussed.

The incumbent typically has responsibility for independently planning and carrying out a major program and resolving most procedural conflicts and technical problems encountered. The incumbent coordinates with principal organizational representatives, and must use initiative in negotiating compliance with Office of Recapitalization policy, standards, and regulations in terms of established objectives. The incumbent determines the course of action to take and the methods and techniques to apply, keeping the supervisor informed of potentially controversial matters, which have far-reaching implications.

Ethical judgments, decisions, and recommendations are accepted as offered. Applicable regulations, laws, directives and other guidelines govern performance of other duties. Completed work, such as reports of program accomplishments, are reviewed from an overall standpoint in terms of: progress being made, compatibility with other Office of Recapitalization activities, effectiveness in meeting Office of Recapitalization objectives, attainment of goals established by the section, staying within allocated budget amounts, avoidance of needless

publicity that would reflect poorly on the Office, and other such policy and administrative concerns.

FACTOR 3 - GUIDELINES

The incumbent must exercise considerable initiative and independent judgment in conducting operations. Guidelines include broad and complex policy directives and regulations from the Office of Recapitalization, the restructuring program in general, and the Multifamily Assisted Housing Preservation Division in particular.

Manuals, internal guidelines, and directives on administrative policy are available for reference but are stated in general terms. Guidelines for performing the professional assignments are scarce and of limited use due to the advanced technical nature of the work assigned to the incumbent.

The incumbent is required to use resourcefulness, initiative, and seasoned judgment based on experience to extend traditional methods and practices in developing solutions to problems where precedents are not applicable. This level may include responsibility for development of new material for use throughout the Office of Recapitalization, or to supplement and explain existing Office guidelines, or to develop and explain guidelines for preservation programs and activities assigned to or undertaken by the Office.

FACTOR 4 - COMPLEXITY

The work consists of preparing, issuing, and implementing policy guidance that impacts a broad range of the Office's operations, as well as private sector companies, state and local HFAs participating in the Office's restructuring program. Assignments involve the implementation of high-level policy decisions and federal legislation. Work is sensitive and technically factual, involving policy and procedural issues. It is expected that the incumbent will exercise tact, judgment and imagination, and will apply sound evaluation principles and administrative abilities to the conduct of required operations.

The assignments include obscure and novel professional problems within the function for managing and overseeing the participation of private sector companies, state and local HFAs as PAEs in the restructuring program, and other contractors supporting other preservation programs and activities. Planning and implementing either individual projects or major studies involving a number of issues deal with these assignments.

The incumbent is also required to develop and modify methods to satisfy his her work requirements.

The incumbent's assignments require that he she recognize possible new directions or approaches to work to improve efficiencies.

Recapitalization Program Specialist

GS-1101-13

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. The incumbent duties will include the development and execution of restructuring agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Recapitalization Office's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs) who are responsible for the initial evaluation, as assigned by the Recapitalization Office, of affordable housing and like projects with the purpose of proposing plans to the Recapitalization Office and other stakeholders for long term preservation. In addition, the Recapitalization Office will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Office's commitment to preservation. In conducting the business of preservation of affordable housing, the Recapitalization Office is responsible for ensuring compliance with relevant laws and statutes.

The incumbent serves as a Recapitalization Program Manager in the Office of Recapitalization and provides leadership, coordination and guidance to the staff and Division Directors in the Office of Recapitalization, and serves as an expert in program and policy development, and tracking the progress of the Office to meet stated objectives for effecting the preservation and improvement of federally assisted properties.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent coordinates the workflow of the staff assigned to project teams within the Office of Recapitalization. The incumbent assists in the management of the day to day operations for resource allocations and employee relations.

The incumbent advises the Associate DAS, Division Directors and subordinate management regarding issues or problems that hinder effective operations in the team's functions. The incumbent provides input to Office of Recapitalization management in reference to policies and procedures within the office and work products and work habits of staff within the team. The incumbent effectively responds to work assignments from management. The incumbent assists the Divisions and Branches in the Office of Recapitalization by providing technical support.

In addition, the incumbent must meet the requirements of the Recapitalization Program Specialist position as described below. The incumbent of this position is responsible for initiating, developing, implementing, reviewing and monitoring the effectiveness of Office of Recapitalization and other affordable housing policies and or procedures.

Typical assignments include:

- Initiates and prepares complex responses to Office of Recapitalization program inquiries and prepares correspondence that is consistent with regulations, handbooks and reports in use by Headquarters, field offices, and the general public.
- Initiates and provides technical advice, guidance and interpretation of policies and procedures on Office of Recapitalization programs for Headquarters and field office staff and affected members of the general public.
- Initiates and develops various affordable housing recapitalization curriculum, training materials and lecture outlines, and conducts formal training programs for Headquarters and field personnel.
- Prepares comprehensive reports concerning findings and recommendations to achieve compliance with correspondence timeframes and formats. Responds to requests for waivers and special consideration of complex recapitalization transactions; conducts regulatory and programmatic research and prepares and responds to waiver requests.
- Plans, initiates, and conducts analytical studies of the various aspects of affordable housing recapitalization procedures for the purpose of evaluating the effectiveness of current policies and procedures with a view towards the development of significant improvements in policy or procedures.
- Develops a project plan, gathers factual data, works closely with interested officials in Headquarters and the field offices to develop and explore alternative solutions, and prepares reports recommending action to be taken, including all necessary staff work to implement the recommendation, if approved. This may include such things as drafts of legislation, operational plans, supporting instructions, correspondence, etc.
- Meets with visitors and representatives of Congress to explain the programs and participate in meetings with other HUD offices and other Federal, state and local agencies in connection with the development and management of affordable housing recapitalization programs.
- Manages third party contracts and monitors performance of contract entities to support the goals of the Office.

- Develops affordable housing recapitalization strategies, researches and prepares the Department's position in response to interrogatories, affidavits and testimony, and works out settlement terms covering litigation matters.

FACTORS

FACTOR 1 - KNOWLEDGE AND SKILLS REQUIRED

- Expert knowledge of affordable housing programs, structure, missions, functions and their organizational relationships.
- Expert knowledge of business writing styles, grammar, spelling, and format of controlled correspondence.
- Extensive knowledge of work and task distribution to improve efficiency of policy and program support operations.
- Ability to make formal and informal presentations (both written and oral).
- Expert knowledge of established management principles, practices, and techniques in administering a specific housing program.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent serves to coordinate and advise Office of Recapitalization management regarding the staff and programs. The incumbent does not perform supervisory functions such as employee discipline or employee ratings. The incumbent is responsible for guidance and coordination of staff who assist the incumbent with augmenting workflow operations with the Office.

The incumbent is under general supervision of organization head. Projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives completed work is also reviewed critically outside the incumbent's immediate office by staff and line management officials whose programs and procedures would be affected by implementation of the incumbent's recommendations.

FACTOR 3 - GUIDELINES

Guidelines used include HUD's policy initiatives, General Accounting Office, Office of Management and Budget and Treasury manuals and other related material. The incumbent uses judgment and discretion in determining, interpreting and revising existing policy and program procedural guidance for use by others within or outside the organization such as line managers and contractors.

FACTOR 4 - COMPLEXITY

Typical assignments required developing detailed plans and goals for implementing recapitalization programs, and or developing criteria for evaluating the effectiveness of the specific recapitalization program policies and procedures. Assignments would involve using different and unrelated processes and methods. Reviewing distinctly different types of regulations and decisions and determining what needs to be done to improve program effectiveness. This requires assessing many issues, including pertinent regulations, a variety of documentation and devising a course of action with various alternatives. Successful executions of the tasks are dependent upon the incumbent's ability to initiate, direct, coordinate, and perform various complex and difficult tasks.

FACTOR 5 - SCOPE AND EFFECT

The work involves establishing methods and criteria for assessing the effectiveness of affordable housing recapitalization program policies and procedures on headquarters and field office operations. The impact of the recommendations involves both policy programs and contracts between Housing and/or Multifamily Housing and private contractors. The purpose of work is to evaluate effectiveness of specific program policies throughout headquarters and the field office structure.

FACTOR 6 - PERSONAL CONTACTS

Personal contacts include co-workers, managers, and supervisors in Housing, personnel from other HUD offices, and officials from other Government agencies, and private industry.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are for the purpose of obtaining, providing, or clarifying information, gathering facts, resolving issues, coordination and devising new and revised systems or programs.

FACTOR 8 - PHYSICAL DEMANDS

The Work is primarily sedentary, although some physical effort may be required.

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an adequately lighted and climate controlled office. The work may require occasional travel.

Recapitalization Transaction Specialist

GS-1101-13

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. The incumbent duties will include the development and execution of restructuring agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Recapitalization Office's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs) who are responsible for the initial evaluation, as assigned by the Recapitalization Office, of affordable housing and like projects with the purpose of proposing plans to the Recapitalization Office and other stakeholders for long term preservation. In addition, the Recapitalization Office will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Office's commitment to preservation. In conducting the business of preservation of affordable housing, the Recapitalization Office is responsible for ensuring compliance with relevant laws and statutes.

The incumbent serves as a Financial Transaction Manager in the Recapitalization Office and is responsible for continuity in all phases of the Transactions and Finance functions. The incumbent reports to the Housing and Neighborhood Transformation Division or the Multifamily Assisted Housing Preservation Division in the Office of Recapitalization.

MAJOR DUTIES AND RESPONSIBILITIES

- Provides advice and technical assistance to the Division Director, Housing and Neighborhood Transformation Division, Office of Recapitalization, and all parties to assisted housing recapitalization transactions, including Owners, Public Housing Authorities, lenders, third party contractors and counsel to such parties.
- Coordinates, interacts and participates in meetings with Office of Recapitalization management, HUD, OMB, and other governmental agencies, both Federal and State, housing finance agencies, Public Housing Authorities, private owners, participating administrative entities, and joint ventures to coordinate and maximize the achievement of the Office of Recapitalization's mission.

- Facilitates the establishment of polices for determining acceptable standards and procedures for: the selection, monitoring and incentivizing of participating administrative entities, joint ventures and other qualified partners; the determination of owner and project eligibility; enforcement actions directed at owners and others; processes for owners to appeal administrative decisions; data collection and due diligence; property appraisal and market comparable determination; property inspection, rehabilitation and environmental compliance; affordable housing preservation; loan underwriting and approval; loan closing and post-closing document conversion; loan servicing and asset management; and the voluntary sale or transfer of housing.
- Stays abreast of housing industry, tax, financing, management, affordability, and real estate trends and policies.
- Responsible for finance and transaction activities relating to the Office of Recapitalization.
- Manages the underwriting of highly complex mortgage debt restructuring and assisted housing conversion transactions.
- Facilitates the performance analyses on non-conforming mortgage debt restructuring transactions and on conforming transactions that require extra review.
- Facilitates and reviews project rent, rehabilitation and expense needs in proposed transactions to ensure completeness, accuracy, and consistency with the Office of Recapitalization Operating Procedures Guide and HUD guidelines.
- Manages and reviews complex real estate appraisals, financial transactions involving mortgage debt restructuring for multifamily housing.
- Manages the examination of the competence of property management, and formulates recommendations regarding the sale or transfer of property.
- Negotiates transaction terms and conditions and recommends approvals or denials of recapitalization proposals.
- Manages utilization of automation, data and information systems, and other technologies to develop underwriting and financial analyses.

FACTORS

FACTOR 1 - KNOWLEDGE AND SKILLS REQUIRED

- Comprehensive knowledge of government, non-profit and profit-making programs governing the development, preservation, financing, and sale of low-income housing, rental assistance to tenants living in low-income housing, and the provision of housing-based services to those tenants.
- Knowledge of credit underwriting, loan restructuring, refinancing and servicing, and real estate management and sale processes, particularly as they relate to multifamily residential properties.
- Broad knowledge of housing ownership structures and relationships, cost accounting standards and practices for commercial and residential real estate, laws related to housing, mortgages, foreclosure, and bankruptcy, and the tax implications of managing and disposing of rental housing and restructuring mortgage debt.
- Knowledge of underwriting principles and practices, including underwriting requirements for restructuring mortgage debt for multifamily subsidized housing, including knowledge of non-federal debt and equity sources that may be utilized in recapitalization transactions.
- Knowledge of real estate appraisal, title surveys, environmental reviews, and mortgage restructuring.
- Knowledge of Section 8 assistance, 236 assistance and other forms of subsidy provided by HUD as well as an understanding of FHA mortgage insurance. Knowledge of Public Housing Authorities and public housing funding and proposed recapitalization techniques.
- Skill in analyzing, assessing, and negotiating modifications to underwriting determinations.
- Skill in assessing and evaluating financial statements and property appraisals.
- Skill in assessing and evaluating business and economic issues, as they relate to mortgage debt restructuring.
- Ability to meet and deal effectively with a wide variety of individuals in both public and private organizations, to effectively plan the work of others, and to use sound judgment in decision making; plus, demonstrated skills in management theories and practices.
- Ability to provide authoritative advice and assistance to others and Office of Recapitalization staff on underwriting issues.

- Ability to negotiate resolutions to appeals by borrowers or PAEs on transactions rejected by the Office of Recapitalization.
- Ability to recommend solutions to difficult issues and problems.
- Skill in meeting and dealing effectively with high-level managers to present, explain, and justify underwriting recommendations and decisions.
- Knowledge of automation and the ability to use a wide variety of available technologies to speed work accomplishment and enhance the quality of work.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent works under the administrative supervision of the Housing and Neighborhood Transformation Division or the Multifamily Assisted Housing Preservation Division of the Office of Recapitalization, with limited direction and review. Final work products are reviewed in terms of accomplishing agency's goals and objectives.

FACTOR 3 - GUIDELINES

Guidelines include broad and complex policy directives and regulations.

Manuals, internal guidelines, and directives on administrative policy are available for reference but are stated in general terms.

The incumbent is required to use resourcefulness, initiative, and seasoned judgment. This level may include responsibility for development of new material for use across the Office of Recapitalization, or to supplement and explain existing Office of Recapitalization guidelines.

FACTOR 4 - COMPLEXITY

The work impacts a broad range of the Office of Recapitalization's operations, as well as participating in the Office of Recapitalization's restructuring program. Assignments involve the implementation of high-level policy decisions and federal legislation. Work is extremely sensitive, intricate and technically factual, involving difficult policy and procedural issues.

The assignments include obscure and novel problems.

The incumbent is also required to develop and modify methods to satisfy work requirements.

The incumbent's assignments require that he she be versatile and innovative in order to recognize possible new directions or approaches; to devise new or improved techniques or strategies.

FACTOR 5 - SCOPE AND EFFECT

The work involves developing criteria, procedures and instructions, and furnishing advisory, planning and review services on wide-ranging projects, programs and functions pertaining to PAEs in the Office of Recapitalization's restructuring program. Conformance with the Office of Recapitalization's regulations pertaining to their participation in the restructuring program, and interest to the general public, affordable and conventional housing groups and the mortgage finance industry. Representatives at all levels of federal, state and local government exhibit continuing interest in PAEs, because problems in this area can affect the economic interests of numerous persons.

FACTOR 6 - PERSONAL CONTACTS

Contacts include senior and high-level staff with the Office of Recapitalization, other HUD program offices, and other Federal agencies, both in Washington and the field. Contacts are also common with persons outside HUD and the Federal government, including representatives from interest groups to the general public affordable and conventional housing groups, and state and local legal and regulatory officials, affordable multifamily property owners, and members of the general public.

FACTOR 7 - PURPOSE OF CONTACTS

Contacts are for the purpose of influencing, motivating and gaining information regarding PAEs in the Office of Recapitalization's restructuring program, in order to ensure compliance with OAHF's business, ethics and other regulations. Relations with the Office of Recapitalization's management personnel and officials, who have diverse backgrounds, viewpoints, and objectives, may be strained when findings are sensitive or controversial. The incumbent must be skillful in approaching the individual or group in order to obtain the desired effect, such as gaining compliance with established policies and regulations.

The incumbent must use tact, persuasiveness, and technical expertise to gain the confidence of these individuals and resolve disagreements in the best interests of the Office of Recapitalization and the Federal government.

FACTOR 8 - PHYSICAL REQUIREMENTS

No unusual physical demands are required for this position.

FACTOR 9 - WORK ENVIRONMENT

The work will be performed in a typical office setting. Travel may be required.

Supervisory Debt Restructuring Specialist

(Mortgage Restructuring Branch Chief)

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, the Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. Preservation efforts will include the development and execution of restructuring agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring/recapitalization of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Office of Recapitalization efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs) who are responsible for the initial evaluation, as assigned by the Office of Recapitalization, of affordable housing and like projects with the purpose of proposing plans to the Office of Recapitalization and other stakeholders for long term preservation. In conducting the business of preservation of affordable housing, the Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent heads up the Mortgage Restructuring Branch and reports to the Division Director of the Multifamily Assisted Housing Preservation Division, Office of Recapitalization. The incumbent interacts with the Office of Recapitalization Headquarters staff involved in preservation activities, HUD's Office of General Counsel, Financial Advisors (FA), and other HUD program offices. This includes ensuring that guidance and communication materials are current and that matters that would mitigate current issues and or enhance program operations are receiving adequate attention from the necessary staff. While the role does not have direct responsibility for completing asset restructurings, there may be occasions when the incumbent is the direct contact with owners and is leading negotiations on behalf of the Office of Recapitalization.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: Directs, manages, and or coordinates the Office of Recapitalization's preservation policies and procedures. Develops comprehensive business and strategic plans to facilitate achieving Office of Recapitalization program objectives.

Analyzes, evaluates, and approves complex proposals for the implementation of preservation activities. Recommendations and decisions, and the implementation of them, will very likely

have a significant impact on the Office of Recapitalization mission. Identifies matters that are hindering preservation and opportunities to enhance preservation; provides overall policy direction to resolve issues and promote efficient operations.

FACTOR 2 - ORGANIZATIONAL SETTING

Reports directly to the Division Director of the Multifamily Assisted Housing Preservation Division for the Office of Recapitalization. Is responsible for the justification of all major preservation program policy changes as well as for providing the strategic framework for developing and or revising preservation policies; assures correct policies and regulatory interpretations; and ensures the smooth functioning and coordination of all preservation programs.

Participates in all high-level meetings to discuss and resolve problems.

Participates in the Office of Recapitalization Loan Committee and may be called upon to chair Committee meetings.

Acts as a general resource on policies and procedures; can expect to be called upon to provide guidance on asset-specific matters (from due diligence to underwriting to owner negotiations to closing).

Attends and participates in stakeholder conferences and meetings to discuss the Office of Recapitalization Programs and to engage on particular asset actions that may be controversial or high profile.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

Advises the Division Director of the Multifamily Assisted Housing Preservation Division as well as subordinate management on such areas as policy planning, implementing and monitoring formal and on-the-job training efforts; making broad assignments; making technical decisions on work problems referred by subordinates supervisors; hearing employee problems and complaints not resolved at lower levels; and resolving disciplinary problems.

Exercises all delegated authority over the planning, direction and execution of the MAHRA regulations responsible for HUD's restructuring of loans to support marked to market assisted housing rents.

Plans and assigns the work of subordinate supervisors, setting priorities and schedules. Evaluates work.

Interviews candidates, recommends and approves appointments, promotions, reassignments. Resolves complaints unresolved at a lower level.

Enacts disciplinary measures adverse actions based on performance and conducts training. Develops and applies performance standards.

Coordinates, directs, oversees all work of subordinate supervisors and subordinates.
Represents the Office of Recapitalization to other organizations, including stakeholders.
Makes supervisory and non-supervisory selections.

Implements and monitors formal and on-the-job training efforts, makes broad assignments to staff, makes technical decisions on work problems referred by subordinates and supervisors, hears employee problems and complaints not resolved at lower levels, and resolves disciplinary problems.

FACTOR 4 - PERSONAL CONTACTS

The purpose of contacts is to motivate reluctant owners to enter into the MAHRA program by submitting their multifamily Housing Assistance Contracts for restructuring.

Contacts are also with difficult owners who may not be eligible for restructuring.

Contacts with executive level HUD officials, congressional committees, national offices of public interest groups are to build support for the program and increase the flux of reluctant applicants.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized.

FACTOR 6 - OTHER CONDITIONS

The Branch Chief oversees work performed by highly skilled professionals. Evidence is the special legislative authority that Congress enacted and special appointment authority given to the Branch Chief to carry out this mandate.

The work is highly technical with a number of expert staff at grade 13.

Staff is, for the most part, recruited from industry, for technical housing structuring expertise.
The program directly affects the amount of affordable low income housing in the United States.

Supervisory Recapitalization Specialist

(Closing/Post Closing Office Director)

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is responsible for efforts which effect the preservation of housing through oversight and monitoring of processes and procedures to complete recapitalization transactions, physical repairs, and grant award and monitoring activities. The Office of Office of Recapitalization oversees affordable housing projects that undergo mortgage restructuring or other recapitalizations with the purpose of proposing plans to the Office of Recapitalization and other stakeholders for long term preservation. In addition, the Office of Recapitalization will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation. In conducting the business of preservation of affordable housing, The Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes. The incumbent leads the Closing/Post Closing Office and reports to the Assistant Deputy Assistant Secretary for the Office of Office of Recapitalization. Responsibilities include directing and supervising the Closing Post-Closing functions. In carrying out these responsibilities, the incumbent considers policy determinations, agency regulations and guidelines, agency goals and objectives, delegations of authority, and Congressional mandates. The Director will implement and direct other preservation programs undertaken by the Office of Recapitalization, as well as act in advisory capacity as needed in the development of new preservation activities.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope:

The incumbent is responsible for efforts that effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures, of affordable housing and like projects with the purpose of proposing plans to the Office of Office of Recapitalization and other stakeholders for long term preservation. This includes the coordination of recapitalization transaction closings and post-closing efforts including release of grant and escrow funds. In addition, the Office of Office of Recapitalization will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs

in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent may participate in the Office of Office of Recapitalization Loan Committee, and may be called upon to conduct a preliminary review of the submission on assigned properties and advise presenters and Committee members of potential issues, to review all other submissions, and cast a vote for approval or denial of the recommendation

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent advises the ADAS for the Office of Office of Recapitalization as well as subordinate management on such areas as policy planning, implementing and monitoring formal and on-the-job training efforts; making broad assignments; making technical decisions on work problems referred by subordinates supervisors; hearing employee problems and complaints not resolved at lower levels; and resolving disciplinary problems.

Plans and assigns and evaluates the work of a subordinate supervisor, setting priorities and schedules. Interviews candidates, recommends and approves appointments, promotions and reassignments

Resolves complaints unresolved at a lower level. Enacts disciplinary measures adverse actions based on performance and conduct. Develops and applies performance standards. Coordinates, directs, oversees all work of subordinate supervisors and subordinates. Represents the Office of Office of Recapitalization to other organizations, including stakeholders. Makes supervisory and non-supervisory selections.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts

May represent the Office of Office of Recapitalization in meetings with executive level officials of HUD, media, politicians, consultants, and other organizations with regard to program planning, projects, meetings, or other preservation issues of importance and relevance. The incumbent ay interact with local officials, Public Housing Authorities, property owners, tenant organizations and other members of the public and for accurately and fairly representing the goals and activities of the restructuring/Recapitalization programs, as needed.

Establishes and maintains continuing liaison with counterparts in other Office of Recapitalizations, as well as in HUD, FHA and other Federal agencies, and with representatives of state and local HFAs, and PAEs participating in the Office of Office of Recapitalization programs.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized. Division Directors are both at the GS 15 level. Director of the Office is at the GS-14 level. Technical experts directly supervised may also be at the GS 14 level.

FACTOR 6 - OTHER CONDITIONS

The Closing/Post Closing Office Director oversees work performed by highly skilled professionals.

The work is highly technical with a base level of work at grade 13. Preservation work may be performed at separate geographical locations and affects assisted multifamily housing in every state in the union.

Staff is, for the most part, recruited from industry, for technical housing structuring expertise. The program directly affects the amount of affordable low income housing in the United States.

DRAFT

Supervisory Recapitalization Transaction Specialist (Finance)

(Housing Finance Branch Chief)

GS-1101-14

INTRODUCTION

This position is located in the Office of Housing, Office of Recapitalization, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. Preservation efforts will include the development and execution of restructuring/recapitalization agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring/recapitalization of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Office of Recapitalization's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs), Public Housing Authorities and other parties who are responsible for the initial evaluation, as assigned by the Office of Recapitalization, of affordable housing and like projects with the purpose of proposing plans to the Office of Recapitalization and other stakeholders for long term preservation. In addition, the Office of Recapitalization will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation. In conducting the business of preservation of affordable housing, the Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent is responsible for managing and overseeing the activities of the assigned portfolio, for ensuring effective management of the restructuring/recapitalization process, and for resolving disputes as they arise. The incumbent has broad responsibility for assigning recapitalization transactions to staff in the Branch and for managing and overseeing a full range of restructuring, financial underwriting, refinancing, and other activities related to rental assistance and neighborhood revitalization. To carry out his or her responsibilities, the incumbent manages an office composed of Loan Underwriters, financial transaction managers, other support staff, and external consultants as may be necessary. In exceptional circumstances, the incumbent will be responsible for processing individual restructuring/recapitalization transactions when no additional assistance is available. The incumbent operates within the purview of his her delegated authority and by applicable provisions of law and general polices. The incumbent will implement and direct other preservation programs undertaken by the Office of Recapitalization, as well as act in an advisory capacity as needed in the development of new preservation activities.

FACTORS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Scope: Responsible for the long and short term planning, development, management, coordination, and implementation of all operational programs, policies and procedures of the Branch. These duties include current preservation responsibilities and new programs as assigned to the Office of Recapitalization by the Office of Housing. Plans and directs the day-to-day activities of all operations within the Branch. Coordinates the processing, review and analysis of financial transactions to recapitalize assisted housing through a subordinate staff consisting of: Loan Underwriters, HUD Facilitators, Coordinators, other support staff, and external consultants, as needed.

Effect: Performs managerial and supervisory duties within the limitations of and in accordance with agency-wide delegations of authority, applicable administrative law, financial guidelines, established policies, and regulations.

This includes: determining the eligibility of projects for mortgage debt restructuring, recapitalization, assessing the capacity of the Office of Recapitalization to develop and oversee the implementation of restructuring/recapitalization plans, and reviewing and approving mortgage debt restructuring/recapitalization plans on a project-by-project basis. Responsible for enforcing the legal requirements for the closing of restructuring transactions, including the requirements pertaining to FHA mortgage insurance, as needed, and ensuring that proper asset management capabilities are in place in accordance with the requirements of long-term regulatory and other agreements after the restructuring/recapitalization has occurred.

Responsible for reviewing and approving expense reimbursements and payment invoices from third parties operating under contractual relations with the Office of Recapitalization.

Responsible for establishing and maintaining an effective system of internal controls to prevent the occurrence of fraud, waste and abuse, including the creation and maintenance of record keeping and documentation.

Responsible for conducting periodic compliance reviews of PAEs, including site visits, to ensure that all policies and procedures required by OAHP are properly and efficiently carried out.

Responsible for ensuring that management information, including information originating with outside parties is provided to the Office of Recapitalization's management information system manager in a timely, accurate and complete fashion.

FACTOR 2 - ORGANIZATIONAL SETTING

Responsible for providing training to Branch staff, and for contributing to the development of training materials and the evaluation of training programs.

Responsible for interacting with responsible officials in other HUD offices to ensure timely and appropriate actions, as needed, to consummate restructuring transactions in accordance with the applicable rules and regulations of those offices.

Establishes goals and objectives for program operations in accordance with policy guidance and initiatives for the Office of Recapitalization. Provides corresponding managerial oversight and guidance to Branch staff.

Recommends sound business initiatives to minimize the costs to HUD, the decline in affordable housing opportunities, the impact on special need tenants, and or the financial loss to the FHA insurance funds. Responsible for initiating innovative strategies to improve the conduct of these activities.

Submits written reports and recommendations for action to the ADAS for review and approval. Performs a full range of managerial duties and special projects, as needed.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

Advises the ADAS for Recapitalization, the Director, Housing and Neighborhood Transformation Division and other management on such areas as policy planning, implementing and monitoring formal and on-the-job training efforts; making broad assignments; making technical decisions on work problems referred by subordinates supervisors; hearing employee problems and complaints not resolved at lower levels; and resolving disciplinary problems.

Exercises all delegated authority over the planning, direction and execution of regulations responsible for HUD's restructuring/recapitalization of loans/projects to support assisted Housing rents. Plans and assigns the work of subordinate supervisors, setting priorities and schedules.

Interviews candidates, recommends and approves appointments, promotions, reassignments. Resolves complaints unresolved at a lower level. Enacts disciplinary measures adverse actions based on performance and conducts training.

Develops and applies performance standards.

Coordinates, directs, oversees all work of subordinate supervisors and subordinates.

Represents the Office of Recapitalization to other organizations, including stakeholders.

Makes supervisory and non-supervisory selections.

FACTOR 4 - PERSONAL CONTACTS

Sub-factor 4A - Nature of Contacts

Represents the Office of Recapitalization in meetings with executive level officials of HUD, media, politicians, consultants, and other organizations with regard to program

planning, projects, meetings, or other preservation issues of importance and relevance to the Office of Recapitalization.

Responsible for interacting with all parties to recapitalization transactions, local officials, tenant organizations and other members of the public and for accurately and fairly representing the goals and activities of recapitalization programs, as needed.

Established and maintains continuing liaison with counterparts in other offices, as well as in HUD, FHA, Public Housing Authorities, and other Federal agencies, and with representatives of state and local HFAs.

Attends and contributes to conferences with other Office of Recapitalization officials, officials from other Federal agencies, staff from state and local HFAs, PAEs participating in OAHP's restructuring program, and representatives from project owners, PHAs, mortgage lenders and loan servicers, tenants, and community action groups on extremely complex and sensitive matters.

Represents the Office of Recapitalization to regional and national officers of public interest groups, large regional and national associations of multifamily and assisted Housing owners, giving formal briefings. Represents the Office of Recapitalization to owners and PHAs.

Sub-factor 4B - Purpose of Contacts

The purpose of contacts is to motivate reluctant owners to enter into the various HUD programs. Responsible for evaluating the potential for conflicts of interest among parties involved in the Restructuring/recapitalization process and resolving disagreements between owners and others involved in the restructuring/recapitalization process. Contacts with executive level HUD officials, congressional committees, national offices of public interest groups are to build support for the program and increase the flux of reluctant applicants. Contacts with owners, HUD officials and all stakeholders are to ensure proper referral and eligible projects to the Office of Recapitalization for preservation, under existing responsibilities and new preservation activities.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized.

Technical experts supervised by this position include Debt Restructuring Specialists and Analysts and Underwriters. The base level of work performed by Specialists and Underwriters is at the GS-13 level.

FACTOR 6 - OTHER CONDITIONS

The incumbent oversees work performed by highly skilled professionals.

The work is highly technical with a base level of work at grade 13.

Preservation work affects assisted multifamily housing in every state in the union.

Staff is, for the most part, recruited from industry, for technical housing structuring expertise. The program directly affects the amount of affordable low income housing in the United States.

DRAFT

Supervisory Recapitalization Transaction Specialist (Preservation)

(Multifamily Housing Preservation Branch Chief)

GS-1101-14

INTRODUCTION

The Multifamily Housing Preservation Branch is located in the Office of Housing, the Office of Recapitalization, Multifamily Assisted Housing Preservation Division, Washington, DC. The Housing Preservation Branch is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation.

In conducting the business of preservation of affordable housing, the Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes.

The Branch Chief leads the Multifamily Preservation Branch in the Recapitalization's Washington, DC Headquarters, and reports to the Division Director of the Multifamily Assisted Housing Preservation Division. The incumbent interacts with the Office of Recapitalization Headquarters staff involved in preservation activities, staff from Preservation Offices, HUD's Office of General Counsel, HUD's Office of Multifamily Housing, Financial Advisors (FA), and other HUD program offices, and directs a staff of professionals in Headquarters, to proactively develop and implement policy, and to resolve preservation blockages in the Office of Recapitalization. This includes managing a staff of professionals, including transaction, underwriting, and policy specialists, analysis of results and identification of needs, oversight of policy development and updating, ensuring that guidance and communication materials are current, and that matters that would mitigate current issues and or enhance program operations are receiving adequate attention from the necessary staff. While the role does not have direct responsibility for completing asset restructurings, there may be occasions when the incumbent is the direct contact with owners and is leading negotiations on behalf of the Office of Recapitalization.

FACTOR LEVELS

FACTOR 1 - PROGRAM SCOPE AND EFFECT

The work involves directing a staff of complex professionals and the application of difficult and complex management principles.. The activities include developing comprehensive business and strategic plans to facilitate achieving the Office of Recapitalization program objectives. Incumbent plans, analyzes, evaluates and oversees the implementation of preservation activities throughout the Office of Recapitalization and ensures compliance by the staff and Housing's employees. In addition, the incumbent identifies matters that are hindering preservation and opportunities to enhance preservation, and provides overall policy direction

to resolve issues and promote efficient operations in Housing programs. The incumbent participates in discussions about preservation opportunities and designs procedures and policies for preservation activities to meet Department and Housing goals. The incumbent is responsible for working with Departmental Offices in HUD, and interacts with the Office of Recapitalization Headquarters staff involving preservation activities, HUD's Office of General Counsel, HUD's Office of Multifamily Housing, Financial Advisors (FA), and other HUD program offices, and directs a staff of professionals in Headquarters to proactively develop and implement policy, and to resolve preservation blockages in the Office of Recapitalization that support and meet Departmental goals. Consequently, the work of the incumbent affects Housing headquarters and field offices in compliance with Housing policies and regulations affecting these responsibilities. Housing programs represent a major segment of HUD and are of High interest to the public, the building and loan industries, various institutions and groups and State and Local Governments. As a consequence of such wide and intense interest, there is frequent change in the nature, scope and emphasis affecting the programs that in turn, affect Housing's operations nationwide.

FACTOR 2 - ORGANIZATIONAL SETTING

The incumbent is under the supervision and is accountable to the Division Director of the Multifamily Assisted Housing Preservation Division of the Office of Recapitalization, who provides only limited reviews of the activities and work products of the incumbent.

Review of the incumbents work covers such matters as fulfillment of program objectives, and effect of advice and influence on the overall programs. The incumbent represents the Branch in meetings held within Housing and HUD and with outside parties and provides authoritative guidance on the activities of the Branch.

Participates in the Office of Recapitalization Loan Committee, and may be called upon to chair Committee meetings. The incumbent acts as a general resource on all Office of Recapitalization policies and procedures; can expect to be called upon by the Office of Recapitalization to provide guidance on asset-specific matters (from referral to due diligence to underwriting to owner negotiations to closing and post-closing).

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

Advises Division Director as well as subordinate management on such areas as data analysis, policy planning, development, and implementation. Exercises all delegated authority over the planning, direction and execution of the MAHRA regulations responsible for HUD's restructuring of loans to support marked to market assisted Housing rents, and the implementation of statutory and regulatory requirements governing the approval of prepayments of HUD Direct and insured loans under the purview of the Office of Recapitalization. Plans and assigns the work of subordinate supervisors, setting priorities and schedules, and evaluates work product. Interviews candidates, recommends and approves appointments, promotions, reassignments. Enacts disciplinary measures adverse actions based on performance and conduct. Trains internal staff, contractors, and stakeholders on policy, procedure, and implementation issues on Mark to Market, as well as any other preservation

activities or programs as assigned to or undertaken by the Office of Recapitalization. Develops and applies performance standards. Coordinates, directs, and oversees all work of subordinate supervisors and subordinates.

Represents the Office of Recapitalization to other organizations, including other HUD and other Federal officials, industry stakeholders, property owners, and tenants. Directs a program that influences over half a billion dollars of FHA funding. Implements and monitors formal and on-the-job training efforts, makes broad assignments to staff, makes technical decisions on work problems referred by subordinates and supervisors, hears employee problems and complaints not resolved at lower levels, and resolves disciplinary problems.

FACTOR 4 - PERSONAL CONTACTS

NATURE OF CONTACTS:

Represents the Office of Recapitalization in meetings with executive level officials of HUD, media, politicians, consultants, and other organizations with regard to program planning, projects, meetings, or other preservation issues of importance and relevance to OAHP. Represents OAHP to regional and national officers of public interest groups, large regional and national associations of multifamily and assisted Housing owners (as well as individual owners), giving formal briefings. Is primary contact for HUD Multifamily Hub and Field Office Directors on matters of policy, communication and coordination.

Educates the Office of Recapitalization, HUD, and other Federal staff, as well as external stakeholders including property owners, tenants, lenders, industry groups, and others, about policy, procedure, and results of the Mark to Market program and other preservation programs or activities as assigned to or undertaken By the Office of Recapitalization.

PURPOSE OF CONTACTS:

The purpose of contacts is to inform internal and external stakeholders of new and existing policy, procedure, results and benefits of Mark to Market and other preservation activities and programs.

Contacts are also to motivate owners and or project managers to enter into the MAHRA program by submitting their multifamily Housing Assistance Contracts for restructuring. Contacts with executive level HUD officials, congressional committees, national offices of public interest groups are to build support for the program.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The majority of technical and professional work performed is highly technical and specialized; a number of program and technical experts supervised by this position are at the grade 12 or 13 level.

The nature of the work is highly technical and requires the balance of competing interests. Considerations include legal aspects (all relevant statutes, regulations, rules, and policy), financial aspects (lender underwriting, due diligence, and notes closing), and public policy aspects (preservation of affordable housing balanced with physical and financial viability, local HUD office input, tenant preferences, and local governmental positions). Policy and procedure development and implementation decisions must be made in this environment.

FACTOR 6 - OTHER CONDITIONS

The incumbent directs work comparable in difficulty to the GS-13 or higher level, requiring exceptional coordination and integration of a number of very important, controversial and complex program segments of professional and or administrative work. The Branch Chief oversees work performed by highly skilled professionals. The work is highly technical with a number of expert staff at grades 13 level.

Preservation work of this branch affects assisted multifamily housing in every state in the country. Staff is representative of industry and HUD, and includes technical HUD, multifamily housing, and lending expertise. The program directly affects the amount of affordable housing in the United States.

Supervisory Rehab Escrow Specialist

(Recapitalization Grant and Rehab Management Supervisor)

GS-1101-14

INTRODUCTION

This position is located in the Office of Recapitalization, Closing/Post Closing Office, Office of Housing in New York City, NY, and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities.

Preservation efforts will include the development and execution of restructuring agreements and conversion of rental assistance for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of the Office of Recapitalization's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs) and rehabilitation escrow administrators who are responsible for the initial evaluation, as assigned by the Office of Recapitalization, of affordable housing and like projects with the purpose of proposing plans to the Office of Recapitalization and other stakeholders for long term preservation. In conducting the business of preservation of affordable housing, the Office of Recapitalization is responsible for ensuring compliance with relevant laws and statutes.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent interacts with peers, HUD Field Office management and staff, Rehabilitation Escrow Specialists, Field Preservation Directors, staff from Preservation Offices, HUD's Office of General Counsel, Financial Advisors (FA), industry partners such as multifamily Owners, lenders and investors, grantees and other HUD program offices, to oversee the recapitalization of multifamily properties, release of grant and loan funds and the completion of property rehabilitation that was provided for in the Office of Recapitalization restructuring or other housing preservation activities. This includes developing policies and procedures to address rehabilitation escrow issues and the roles and responsibilities of the numerous parties involved; interacting with Rehabilitation Escrow Specialists, HUD Field Office staff, and property owners, grantees, Public Housing Authorities, property managers and lenders, to ensure that planned rehabilitation is completed or that changing circumstances are appropriately addressed and documented in revised plans or agreements. The role has direct contact with owners and places the incumbent in the position of leading negotiations on behalf of OAHP.

In addition, this office will assist the Office of Recapitalization in grant administration and processing for preservation programs that are in existence or future grant preservation programs. This may require funds control and disbursement in addition to administration.

FACTOR 1 - PROGRAM SCOPE AND EFFECT

Directs and oversees staff, and manages contractors who are tracking, monitoring, and investigating the status of rehabilitation escrow accounts and or grants established in the Office of Recapitalization restructuring or other housing preservation activities. Activities, functions, or services accomplished directly and significantly impact a wide range of agency activities, the work of other agencies, or the general public.

Identifies matters that are hindering achieving program objectives including timely and on-budget completion of rehabilitation, researches possible solutions, drafts policy, procedure, or position papers to support a recommendation, interacts with the Office of Recapitalization and other HUD staff, contractors and stakeholders to refine the recommendation and get approval, and implement the solution.

Provides support for special projects as needed, related to housing preservation activities and or rehabilitation administration.

FACTOR 2 - ORGANIZATIONAL SETTING

The Rehab Escrow Administration Manager reports to the Closing/Post Closing Office Director. May be called upon to conduct a preliminary review of preservation transactions on assigned properties and comment on potential issues, to review all other restructuring submissions, and participate in a committee for approval or denial of the transaction.

Attends and participates in training sessions for OAHP or other HUD staff and or PAE staff, and for external stakeholders such as property owners, managers, and lenders; may participate in developing the training agenda and the materials to support the training session on topics including rehabilitation escrow management.

FACTOR 3 - SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

The incumbent advises the Director of the Closing/Post Closing Office and other Office of Recapitalization Directors on Rehabilitation Escrow and or grant issues. Coordinates, directs, and oversees all work of subordinates.

Makes technical decisions on work problems referred by subordinates.

Evaluates the work performance of subordinates.

Interviews candidates, recommends selections, promotions, reassignments.

Resolves complaints unresolved at a lower level.

Resolves disciplinary problems, enacts disciplinary measures adverse actions based on performance and conduct.

Trains new and existing staff on policy and procedure matters.

Develops and applies performance standards.

FACTOR 4 - PERSONAL CONTACTS

NATURE OF CONTACTS:

Acts as a general resource on all rehabilitation escrow policies and procedures; can expect to be called upon by the Office of Recapitalization to provide guidance on asset-specific matters.

Researches inquiries from members of Congress, owners, attorneys and other public officials, stakeholders, and HUD management; recommends a course of action as the Office of Recapitalization's response to the inquiry, and may draft written responses, make telephone calls, or participate in meetings.

Attends and participates in stakeholder conferences and meetings, as approved by the Office of Recapitalization, to discuss programs and to engage on particular asset actions that may be controversial or high-profile.

Represents the Office of Recapitalization in meetings with executive level officials of HUD with regard to program planning, projects, meetings, or other preservation issues of importance and relevance to OAHP.

Represents the Office of Recapitalization to property owners and other parties to recapitalization transactions.

PURPOSE OF CONTACTS:

The purpose of contacts is to resolve rehabilitation escrow issues with property owners and lenders in the HUD preservation programs.

Responsible for evaluating the potential for conflicts of interest among parties involved in the restructuring process and resolving disagreements between owners and others involved in the rehabilitation escrow and or grant process.

Contacts may be with difficult clients and the incumbent may have to influence, motivate, or persuade them.

Contacts with executive level HUD officials are to brief the officials on escrow administration policies and procedures, and to explain property-specific challenges and resolutions.

Contacts with contractors and rehabilitation escrow administrators are to resolve escrow administration issues not resolved at lower levels.

FACTOR 5 - DIFFICULTY OF TYPICAL WORK DIRECTED

The incumbent manages an office consisting of four employees including three GS-13 Rehab Escrow Specialists, and one GS-0399-4 Clerical Support. The highest level of base work is GS-13 or higher. The work supervised constitutes 25% or more of the incumbent's time.

The majority of technical and professional work performed is technical and specialized. The incumbent is HUD's technical expert in this field.

FACTOR 6 - OTHER CONDITIONS

The Grant and Rehab Supervisor oversees work performed by highly skilled professionals, and requires exceptional coordination and integration of a number of very important and complex program segments or programs comparable in difficulty to the GS-13 level or higher.

Staff is, for the most part, recruited from industry, for technical housing structuring expertise. The program directly affects the quality of affordable housing in the United States.

DRAFT

Administrative Staff Specialist

GS-0301-14

INTRODUCTION

This position is located in the Management Division, Office of Technical Assistance and Management. The Management Division, Human Resources Branch, provides advice to the Office of Community Planning and Development (CPD) on all personnel, employee and labor relations and management support areas. The incumbent is the administrative staff specialist with knowledge of all aspects of CPD's personnel, training and management support programs and functions.

MAJOR DUTIES AND RESPONSIBILITIES

The incumbent serves as an expert to managers and employees of CPD in personnel management. The incumbent reviews request for personnel actions for justifications of request and accuracy of organizational data. Prepares all supporting documentation, reviews for accuracy all position descriptions, composes new position descriptions as appropriate; reviews all crediting plans, determines the appropriate selective and quality ranking factors, and develops new crediting plans and assessment tools from scratch as appropriate. Each personnel action requesting the recruitment, reassignment or promotion etc., of employees requires the incumbent to assure appropriate EPPES PACS EPAS available and or developed for the position. Daily communication is made with the CPD Managers, Human Resource Specialist and colleagues on the processing of personnel actions, advertisement of vacancies, panel process and the effective dates of executed personnel actions.

The incumbent is responsible for assuring the confidentiality of all work processed. The administrative staff specialist supports the Director, Management Division with the resolution of staff regarding employee and labor relations issues. All work in this area is coordinated through OHR's Labor and Employee Relations Division. The specialist works closely with the manager in determining the appropriate action to be taken and, as assigned, prepares disciplinary action correspondence for review, approval and signature of the affected employee's supervisor. The incumbent develops reports on staffing actions and other HR related subjects. The incumbent is also responsible for collecting, reviewing and analyzing a variety of data including statistical information. Data may be obtained through other reports, files, and records, meetings and or interviews. The incumbent also develops accompanying charts and graphs to depict HR significant issues and changes in staffing trends.

There are requests from varied sources within and occasionally outside the agency for information and work products requiring extensive research on the part of the Specialist. The incumbent may be required to conduct complex management studies, work on many special assignments and participates in special projects. The nature of some of these assignments may be confidential.

FACTORS

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

- Expert knowledge of the labor management policies and regulations and the negotiated agreement.
- Expert knowledge the EEO discrimination complaint process, and Federal and HUD regulations and policies governing EEO activities knowledge of the administrative policies and regulations.
- Expert knowledge of the Program Office organizational structure to provide advice and guidance on policy issues.
- Knowledge of the Program Office functions, and organizational relationships in Headquarters and the field.
- Ability to serve as a counselor and trouble-shooter on work life services and represent the office as an expert in the resolution of a variety of different problems.
- Skill in investigating, discussing and analyzing issues, complaints and problems and in devising solutions as resolutions, including researching precedents.

FACTOR 2 - SUPERVISORY CONTROLS

The supervisor establishes overall objectives and identifies the resources available. The incumbent in consultation with the supervisor, develops priorities deadlines and project assignments. The incumbent is responsible for planning activities, direction or carrying out the assignments resolving most conflicts through negotiation and coordination the work with other agency specialists and independently accomplishing objectives within the framework of agency policies. The work is usually reviewed in terms of overall accomplishment of established goals and objectives.

FACTOR 3 - GUIDELINES

Guidelines are general Departmental and office policy, legislation, Federal regulations, and broadly stated technical objectives. These broadly stated, general guidelines require interpretation for application to specific issues or cases. The incumbent uses judgment in selection the appropriate procedures or references for the assignment. Situations where significant deviations needed may require the incumbent to formulate techniques to accommodate the issue. The work requires the development of procedural guides to supplement higher-level issuances.

FACTOR 4 - COMPLEXITY

The work consists of continuing assignments involving direct responsibility for the operational control of a number of administrative management, labor and employee relations, EEO or AEP activities. The work typically involves accomplishing objectives within established policy plans and requires maintaining cooperative relationships with managers and employees. Decisions identify problems or deficiencies. The work also requires the formulation of proposals to accomplish assignments. The incumbent serves as an expert.

FACTOR 5 - SCOPE AND EFFECT

The incumbent affects the effective and efficient utilization of resources and avoiding fraud, waste, and mismanagement issues. The incumbent provides expert services to employees and managers through the office in a variety of administrative management of human resource areas. The purpose of the work is to coordinate and monitor the administrative management, employee relations labor relations, and EEO activities, and to recommend or initiate corrective actions as required.

FACTOR 6 - PERSONAL CONTACTS

Contacts are with managers and employees at all levels within the office and other HUD offices to accomplish the goals of the office. Contacts are with Union officials, EEO representatives and experts in all areas of administrative management. Contacts include experts and managers in the private sector and other Federal agencies.

FACTOR 7 - PURPOSE OF CONTACTS

To explain procedures and counsel on administrative management activities employee relations, labor relations, and EEO matters. Contacts are to obtain clarify and provide information recognized as the expert on the matters and issues for the organization.

FACTOR 8 - PHYSICAL DEMANDS

Work is sedentary

FACTOR 9 - WORK ENVIRONMENT

The work is performed in an office setting.