



Hi-Desert Water District Classification Specification

Job Title: Grant and Loan Coordinator

Job Grade: 8

FLSA Status: Non-Exempt

Date: September 2018

JOB SUMMARY

Under the general direction of the CFO, the position of Grant and Loan Administrator is a professional level position responsible for performing a myriad of accounting and finance functions relating to property owner connections to the sewer system. Assists in the creation and coordination of the USDA grant and the low-income loan processes. This position is fully trained, and acts as back-up to the Assessment Coordinator.

SUPERVISION RECEIVED / EXERCISED

Receives general direction from the CFO. Provides work coordination for other accounting/administrative support staff.

ESSENTIAL FUNCTIONS *(include but are not limited to the following)*

*Class specifications are only intended to present a description summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not** include all duties performed by individuals within a classification. In addition, specifications are intended to outline the minimum qualifications necessary for entry into the class and do not necessarily convey the qualifications of the incumbents within the class.*

- Provides responsible professional and technical assistance to the CFO, Controller and other members of management staff in the administration and implementation of the District's low-income assistance loan, expanded use loan, and grant application processes related to the sewer construction project.
- Keeps immediate supervisor accurately informed of work progress, including present and potential problems and suggestions for new or improved methods of addressing such problems.
- Process a large amount of inbound and outbound telephone calls and in person meeting with/from customers, property owners, co-workers, and other outside parties. Assures interactions are effective and respectful. Topics discussed include, but are not limited to:
 - property connection issues
 - property tax assessment issues
 - lateral sewer connections
 - expanded use loan program
 - low-income loan program
 - grants available to assist property owners

- Works with property owners to identify any grants and/or loans available to assist in the construction of private property connections. Explains the different options available as well as the terms of the loan or grant options.
- Meets with property owners to obtain information for loan applications and to answer questions about the process.
- Reviews and analyzes grant and loan applications and all supporting documents to determine loan or grant eligibility and inputs data into appropriate automated database
- Obtains and verifies the required documentation to properly record liens against the property once a loan application is processed and then files liens with the county. Processes lien releases when properties are sold, and the loans are repaid. Initiates collection/foreclosure procedures when loans are in default.
- Assures loan application packets are complete and the information is verified then assures disbursement of loan proceeds to the proper parties.
- Provides payoff information and answers general assessment questions to loan and title companies and other involved parties when requested.
- Identifies grant/funding opportunities for the District and submits grant applications on a timely basis, ensuring compliance with all regulatory requirements.
- Guides low-income property owners through the application process for the District Low Income Assistance Loan Program or the USDA Low Income Grant Program.
- Guides commercial and private property owners through the application process for the Expanded Use loan program for sewer connections.
- Maintains a solid working knowledge of the District's accounting and financial database systems.
- Performs periodic audits of internal accounting records to insure accurate controls.
- Prepares external audit documentation and interfaces with independent auditors in the audit process.
- Takes loss, damage or injury information caused by, or related to the sewer project, and passes the information on to the proper contractor personnel for settlement.
- Scans and indexes documents into the imaging database.
- Provides assistance to the CFO to include, but not limited to tasks such as:
 - Grant and loan administration
 - Related duties as assigned
 - Management of support staff as required.

JOB SPECIFICATIONS

Knowledge

- Principles and practices of accounting, finance, loan and grant administration and the development and maintenance of fiscal controls.
- Laws, rules, ordinances, and legislative processes controlling District financial functions and operations.
- Principles and practices of auditing.
- Principles and practices of grant writing and grant administration.

Skills and Abilities

- Proficient with Microsoft Excel, Outlook, Word, PowerPoint and Access.
- Active Listening – Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Speaking – Talking to others to convey information effectively.
- Writing – Communicating effectively in writing as appropriate for the needs of the audience.
- Judgment and Decision Making – Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Critical Thinking – Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Service Orientation – Actively looking for ways to help people.
- Excellent time management and organizational skills – must be detail-oriented and thorough.
- Ability to perform in cross-functional team approach and job responsibilities.
- Assist with District budget development and fiscal controls.
- Prepare a variety of financial reports.

PHYSICAL, MENTAL AND ENVIRONMENTAL WORKING CONDITIONS

The essential functions of this position may require the employee to perform the following physical activities. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

- Work in an office environment with some exposure to dust, dirt and hazardous materials.
- Work at a desk for extended periods of time. Stand, walk and sit for extended time periods; able to carry, push, pull, reach and lift objects of up to 15 pounds such as large binders, books, and small office equipment. Move boxes paper, envelopes, bills and reports using a cart. Hearing and vision within normal ranges with or without correction.
- Communicate orally with District management, co-workers, and the public in face-to-face, one-on-one and group settings; regularly use a telephone and two-way radio for communication.
- Sufficient finger/hand coordination and dexterity to operate and adjust office equipment. Operate office equipment such as computer and keyboard, copiers and fax machines; look at computer monitor for extended time periods.
- Travel by vehicle while conducting District business.
- Read and interpret complex data, information and documents; analyze and solve complex problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with all levels of District management, board members, other elected and appointed government officials, media representatives, business and community leaders, employees, financial institutions, consultants, vendors, the public and others encountered in the course of work.

QUALIFICATIONS

Education and/or Previous Work Experience:

Any combination of experience and training that would provide the knowledge and abilities to perform the position is qualifying. A typical way to obtain the required knowledge and abilities would include the following:

- Completion of a bachelor's degree in Accounting, Finance or Business preferred.
- One (1) to three (3) years progressively increasing responsibilities in general accounting, processing of loans and liens, and/or financial management.
- Accounting or grant administrative work experience within a public agency desirable.

License / Certificate:

- Possession of a valid California State Notary Public Commission or must obtain a valid Commission within ninety (90) days of employment.
- Possession of a valid Class C California driver's license and satisfactory driving record free from multiple or serious traffic violations or accidents for a period of at least two (2) years.

Other requirements:

Completion of and satisfactory results of pre-employment drug test, physical examination indicating fitness for duty, DMV record review, and background investigation.