



**City of Casa Grande**

### **Housing Intake & Financing Specialist**

**GENERAL PURPOSE:** Under general supervision, performs administrative and clerical work in assisting potential housing program participants with the application process.

#### **PRIMARY DUTIES AND RESPONSIBILITIES:**

*The following duties **ARE NOT** intended to serve as a comprehensive list of all duties performed by all employees in this classification, only a representative summary of the primary duties and responsibilities. Incumbent(s) may not be required to perform all duties listed and may be required to perform additional, position-specific duties.*

- Assists in the recruitment of participants for housing programs.
- Assists prospective program participants in the preparation of housing program and loan application package; secures and reviews credit reports and verifications of employment and income; makes preliminary determination of program eligibility for review and approval.
- Screens and evaluates applicants; interviews clients to collect financial information; advises clients of additional community resources.
- Reviews source documents for compliance to rules and regulations; evaluates financial and technical transactions within designated limits.
- Checks documents for validity and accuracy of information; reviews and assembles client files and distributes related paperwork.
- Enters data into computer systems; processes applications, compiles documentation, and generates reports.
- Prepares letters, memoranda, forms, files and other reports as needed.
- Provides assistance during housing construction, including counseling relating to family budgeting and loan repayment ability.
- Answers phones, provides information and assistance to visitors, and responds to requests for information within the span of authority.
- Performs other duties as assigned or required.

**SUPERVISION EXERCISED:** None.

**JOB DESCRIPTION**  
**HousingIntake&FinancingSpecialist.doc**

**MINIMUM QUALIFICATIONS:**

**Education and Experience:**

High School diploma or GED equivalent, and one (1) year of loan processing or other technical application processing experience.

**Necessary Knowledge, Skills and Abilities:**

- Knowledge of City policies and procedures.
- Knowledge of procedures, methods, and techniques of determining program eligibility.
- Knowledge of Federal and state lending codes and regulations.
- Knowledge of local community resources and community services programs.
- Knowledge of the principles of record keeping and records management.
  
- Skill in obtaining information through interviews and financial documents.
- Skill in record keeping and report preparation.
- Skill in working well with people of varied socioeconomic backgrounds.
- Skill in operating a personal computer utilizing a variety of business software.
- Skill in effective oral and written communication.

**Special Requirements:** May be required to have bi-lingual English/Spanish language skills.

**Physical Demands / Work Environment:** Standard office environment.

*The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as needed.*