

**POSITION DESCRIPTION**

**PORTFOLIO MGMT SPECLST, GS-1101-13**

SETID	HUD01	JOB CODE	HP0738	DATE	01/03/2011	OPM CERT #			
PAY PLAN	GS	SERIES	1101	GRADE	13	PAY BASIS	Per Annum	FUNC CLASS	NA
WORK TITLE	PORTFOLIO MGMT SPECLST								
SPVY LEVEL	Other	POSITION SENSITIVITY	NCrit Sens	LEO POSITION	N/A	MEDICAL CHECK REQ.	No	BUS CODE	1120
FLSA	Nonexempt	PATCOB	Admin	EXECUTIVE DISCLOSURE	No	EMPL/FIN INTEREST	No	FUND SOURCE	Approp Fnd
CLASSIFIER	Yvonne M Rorie								
CLASS STANDARD									
DATE CLASSIFIED	01/03/2011								

**MAJOR DUTIES**

Portfolio Management Specialist,

GS-1101-13

The duties performed are those of a journeyman who functions with substantial independence on a full range of assignments. The supervisor may provide advice and some technical review on the more complex, broad or unusual projects assigned. This position is located in the Public Housing Field Office and is supervised by the Director, Office of Public Housing, Program Center Coordinator or subordinate supervisor as assigned who assigns work in general terms of overall objectives and results desired. The position requires practical knowledge of a wide range of policies and procedures for the servicing of the Low Rent Public Housing, Section 8 Housing Voucher, Certificate and Moderate Rehabilitation Programs the Capital Fund Programs [HOPE6, Modernization, Development, etc.], Management Assessment Programs [i.e., PHAS, SEMAP], Operating Fund Programs, and Resident Self Sufficiency and Economic Independence programs. While acting as a representative of HUD and PIH, the position requires independent action in making determinations, recommendations, and investigations that involve the above program areas. The incumbent serves as an internal consultant within the field office and to the Program Centers on technical problems involving PIH activities and projects. The incumbent must handle a wide variety of matters within the scope of the Office's responsibilities. The incumbent is responsible for insuring the physical integrity and financial viability and Managing the efficient and effective coordination, and operation of PIH programs. Serves as an expert in problem identification and resolution. Applies an extensive knowledge of management concepts, principles, methods and practices, i.e., HUD statutes and regulations, handbooks, commercial and real estate principles and practices and property management practices. The position requires a broad background and experience in various functions; a full and in-depth understanding of HUD Asset Management procedures and guidelines, and government contracting processes. Skillfully negotiates with PHAs in agreements and arrangements for maintaining viability of troubled properties.

MDAs and Duties for this Position

Portfolio Management 50%

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 for Position Description

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decisions on needed management improvements and ultimately development viability. Reviews and evaluates 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 Portfolio Analyst develops solutions to facilitate maintaining the stock of affordable housing in decent safe, sanitary, and drug-free conditions.

Ensures that physical inspections are conducted as required for the purpose of evaluating physical conditions, maintenance, and security. Approves plans of action and monitors progress until completion. Identifies projects needing on-site management reviews and plans and conducts the management reviews to evaluate financial management, leasing and occupancy practices, resident management relations, and all other property management practices. Provides expert advisory assistance developing solutions to complex Property Management problems and serves as an asset manager for the complex property portfolios.

Serves as a liaison, advisor, and representative on sensitive and complex issues. Reviews audits of projects, takes action to have PHAs comply with the regulations. Recommends closing of HUD-OIG audit findings when compliance has been attained.

Analyzes PHAS SEMAP or a revised management assessment instrument scores data, results of the physical inspections, audit findings and results of a customer service survey to identify trends, and develop strategies and unique plans to address extremely complex problems and issues;

Utilizes available computer equipment and data systems to maintain current PHA data, track PHA performance trends and compliance issues, and generate appropriate work products;

Responds to questions issues raised by staff in Field Offices, residents of housing authorities, applicants, and outside parties; response can be either over the phone, via email, or formal written correspondence.

Coordinates activities with all Field Offices and

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Headquarters staff.

Reviews progress of Troubled, Near Troubled PHAs or PHAs with Improvement Plans to ensure that targets are being met and to recommend corrective actions in those cases where performance shortfalls exist.

Conducts and Reviews Risk Analysis assessments with pertinent staff to assure a performance oriented approach to the correction of PHA problems relative to, but not limited to, the financial and physical condition of PHA's developments in assigned portfolio.

Initiates, convenes, and chairs meetings, workshops,

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seminars, and conferences.

Monitors the PHA's use of subsidy, whether Public Housing or Housing Choice Vouchers to promote maximum utilization (vacancy monitoring and HCV optimization).

Oversees Cap Fund processing and oversight of the condition of the property with needs assessments, annual plans, 5 year cap fund plans, units, and the proper use and coordination of release of funding, including Energy Performance Contract's, utility analysis, etc.,

Tasks include:

Managed complex property portfolios for agency owned and or leased assets for a region.

Social Services Program 20%

Works with management and communities to assist in facilitating the development of such things as 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, owner's management agents, for initiating and implementing resident involvement in the development management. Develops and implements plans designed to enhance relationships with HUD stakeholders and clients.

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Tasks include:

Evaluated the progress of social services programs and made recommendations for improving program performance.

Financial Advisory Services 30%

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. Identifies performance trends which indicate a particular problem area and develops strategies for responding to these trends. Takes action to either correct compliance violations by developing tailored training packages, information dissemination, or recommending that potentially severe compliance issues be referred to the Inspector General; Routinely Assesses the performance of the PHAs in meeting public and assisted housing goals, using available information for both the Low Rent Public Housing and Section 8 programs. Analyzes and resolves complex issues related to the financial aspects of programs where the resolution of problems requires an integrated financial approach.

Tasks include:

I have projected complex financial data and reports to determine overall financial status for key agency programs, such as regional programs.

Collateral Duties

Factor Statements

Factor 1-8 Knowledge Required by the Position

~~~~~ The position requires: (1) Mastery of a wide range of qualitative and or quantitative methods for the improvement of complex grant management processes and policies; (2) Serves as staff specialist for a significant

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program area and evaluates a wide variety of program grants applications; (3) Comprehensive knowledge of the full range of grant administration laws, policies, regulations, and precedents applicable to the administration and management of grants; and (4) Skill in planning, implementing, and evaluating complex grants that have a wide impact on the work of the agency and its mission.

#### Factor 2-4 Supervisory Controls

~~~~~ The supervisor and employee develop a mutually acceptable work plan that typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Within the parameters of the approved work plan, the employee is responsible for planning and organizing the work, estimating costs, coordinating with staff, management personnel, and grantees, and conducting all phases of the grant award process. The employee informs the supervisor of potentially controversial findings, issues, or problems with widespread impact. Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with grant administration guidelines and effectiveness in achieving intended objectives.

#### Factor 3-4 Guidelines

~~~~~ Guidelines consist of general grant administration policies, processes, and procedures that require considerable adaptation and or interpretation for application to grant administration issues, problems, and questions. Policies and precedent grant awards provide basic guidelines but do not go into detail as to the methods used to accomplish the work. Within the context of broad regulatory guidelines, the employee may refine or develop more specific guidelines such as implementing regulations or methods.

#### Factor 4-5 Complexity

~~~~~ The work involves independently performing the full range of grant review processes and resolving complex grants management problems requiring new approaches.

Develops criteria and standards for the planning, implementation and evaluation of grant proposals.

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#### Factor 5-5 Scope and Effect

~~~~~ Administers complex grants that have a broad impact on the work of the agency and its missions. Oversees program or study grants and evaluates significant changes from the original approach methods contemplated, suggests effective modifications, and recommends action to higher management. Identifies and

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develops ways to resolve problems or cope with issues which directly affect the accomplishment of principal program goals and objectives. Develops new ways to resolve major grant administration problems.

### Factor 6-3 Personal Contacts

~~~~~ Contacts are with persons outside the agency that may include consultants, contractors, or business executives in a moderately unstructured setting. Contacts may also include the head of the employing agency or program officials several managerial levels removed from the employee when such contacts occur on an ad-hoc basis.

### ~~~~~ Communication

- Requires contact with others (face-to-face, by telephone, or otherwise)
- Requires face-to-face discussions with individuals or teams
- Requires telephone conversations
- Requires use of electronic mail
- Requires writing letters and memos

### Factor 7-3 Purpose of Contacts

~~~~~ The purpose of the contacts is to provide advice and assistance in the development of criteria and standards for the planning, implementation, and evaluation of grant proposals. Provides information to influence managers or other officials to accept a

**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.)

## EVALUATION STATEMENT