

## DUTY STATEMENT

TECH 052 (REV. 02/2018)

PROPOSED

RPA NUMBER (HR USE ONLY)

25-086

**ALERT: This form is mandatory for all Requests for Personnel Action (RPA).****INSTRUCTIONS:** Before completing this form, read the instructions located on last page.

## Section A: Position Profile

|                                                                                                                                                          |                               |                                                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A. DATE<br>1/30/2026                                                                                                                                     | B. APPOINTMENT EFFECTIVE DATE | C. INCUMBENT NAME<br>Vacant                                                                                                                                                                                         |
| D. CIVIL SERVICE CLASSIFICATION<br>Analyst II                                                                                                            |                               | E. POSITION WORKING TITLE<br>Performance Solutions Consultant                                                                                                                                                       |
| F. CURRENT POSITION NUMBER<br>695-244-5393-723                                                                                                           |                               | G. PROPOSED POSITION NUMBER (Last three (3) digits assigned by HR)                                                                                                                                                  |
| H. OFFICE / SECTION / UNIT / PHYSICAL LOCATION OF POSITION<br>Office of Administrative Services/Human Resources/People and Culture/People Relations PG 1 |                               | I. SUPERVISOR NAME AND CLASSIFICATION<br>Carol Chavez-Perez, Supervisor I                                                                                                                                           |
| J. WORK DAYS / WORK HOURS / WORK SHIFT (DAY, SWING, GRAVE)<br>M-F 8AM – 5PM                                                                              |                               | K. POSITION REQUIRES: FINGERPRINT BACKGROUND CHECK <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO<br>DRIVING AN AUTOMOBILE <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO |

## Section B: Position Functions and Duties

Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <b>Information Technology Domains</b> (Select all domains applicable to the incumbent's duties/tasks.)<br><input type="checkbox"/> Business Technology Management <input type="checkbox"/> IT Project Management <input type="checkbox"/> Client Services<br><input type="checkbox"/> Information Security Engineering <input type="checkbox"/> Software Engineering <input type="checkbox"/> System Engineering                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|                               | <b>Organizational Setting and Major Functions</b><br>Under the direction of the Supervisor I, the Performance Solutions Consultant (Analyst II) is responsible for providing independent consultation to all levels of management on employee performance management and progressive discipline. The Analyst II reviews, edits, and drafts a variety of memorandums, notices, and other documents related to performance issues, and serves as a liaison to the California Department of Human Resources (CalHR) and the State Personnel Board (SPB).                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 35% of time performing duties | <b>Essential Functions</b> (Percentages shall be in increments of 5, and should be no less than 5%.)<br><br><b>Performance Memorandums, Notices and Adverse Actions</b> <ul style="list-style-type: none"><li>Draft, review and edit job expectation memorandums, counseling and corrective memorandums, merit salary adjustment denials, Absent Without Official Leave (AWOL) notices, and other related documents including adverse actions, rejections during probation, probation reports and performance appraisal summaries.</li><li>Analyze individual cases and provide well-supported recommendations regarding the appropriate level of disciplinary action.</li><li>Ensure that all memorandums, notices, and actions comply with applicable State and Federal laws, rules, and regulations, as well as SPB, CalHR standards, departmental policies, procedures, and bargaining unit contract provisions.</li><li>Coordinate the timely and proper service of adverse actions and rejections during probation.</li></ul> |
| 35%                           | <b>Consultation</b> <ul style="list-style-type: none"><li>Provide guidance, consultation and performance management strategies to all levels of management on a wide range of sensitive employee performance and conduct issues, including progressive discipline, corrective and adverse actions, medical actions, rejections during probation, AWOL separations, merit salary adjustment denials, and terminations with fault.</li><li>Advise managers on the development and communication of job expectations, probationary reports, and performance appraisals.</li><li>Interpret and explain State and Federal employment laws, rules, regulations, department policies, procedures, and bargaining unit contract provisions related to performance management and discipline.</li></ul>                                                                                                                                                                                                                                      |
| 15%                           | <b>Collaborate</b> <ul style="list-style-type: none"><li>Collaborate with other Human Resources (HR) team members to ensure alignment and consistency in performance management and employee relations practices.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

10%

- Provide training and guidance to HR staff on performance management processes, progressive discipline, and related HR procedures.
- Develop and deliver training to supervisors and managers on topics such as employee performance expectations, documentation, corrective actions, and effective supervision.
- Attend and participate in various SPB hearings.

#### **Performance Inbox**

- Review probation reports and performance appraisal summaries submitted to the Performance inbox to determine whether feedback provided is appropriate and whether reports have been properly completed; follow up with submitting manager to provide guidance on how to provide proper feedback and complete report, if necessary
- Route inquiries submitted to Performance box to appropriate HR personnel, if needed
- Promptly and properly log submitted reports into PeopleSoft/HRS and file in digital OPF. Receive and review requests to remove documents from OPF and route to Assistant HR Chief and HR Chief.

5% of time  
performing duties

#### **Marginal Functions** (Percentages shall be in increments of 5, and should be no more than 5%.)

- Travel to other department locations or attend off-site training sessions, as required.
- Perform other duties as assigned in support of departmental goals and operational needs.
- Act as a notetaker at Skelly Hearings, draft and circulate Skelly notification letters.

#### **Work Environment Requirements**

- Ability to work under stressful situations.
- May be required to work overtime, off-shift hours or weekends.
- Travel to various work sites throughout the state may be required.

#### **Allocation Factors** (Complete each of the following factors.)

##### **Supervision Received:**

The Analyst II receives general direction from the Supervisor I and Supervisor II Section Chief.

##### **Actions and Consequences:**

The Consultant must be able to make sound decisions both independently and in a collaborative environment. This role requires the ability to provide well-reasoned recommendations on a variety of complex issues, as well as to effectively prioritize, plan, and organize workload to meet established deadlines and respond to changing priorities. A high level of accuracy and attention to detail is essential, as errors or misinterpretations related to performance management actions may result in employee grievances or adverse legal consequences for the Department. Failing to protect HR confidentiality can lead to serious legal troubles and long-term damage to the Departments reputation.

##### **Personal Contacts:**

Requires interaction with all levels of staff within the department at various worksites and control agencies such as CalHR, State Controller's Office (SCO), and the Department of Justice (DOJ).

##### **Administrative and Supervisory Responsibilities:**(Indicate "None" if this is a non-supervisory position.)

None

##### **Supervision Exercised:**

None

#### **Other Information**

##### **Desirable Qualifications:** (List in order of importance.)

- Ability to communicate in a clear and concise manner, both written and verbal.
- Must be able to organize, prioritize and consistently use good judgment.
- Must be able to reason logically, take the correct course of action and manage multiple priorities.
- Ability to exercise tact and confidentiality associated with sensitive and personnel related work.
- Must be willing to travel.
- The analyst must be able to establish and maintain effective working relationships with individuals encountered during the course of work.
- Follow both oral and written directions.

- Must be able to effectively manage competing priorities, shifting deadlines and perform a variety of tasks efficiently and with accuracy and attention to detail.
- The analyst should demonstrate the ability to work well under pressure, make sound decisions, develop well-reasoned recommendations, and work independently to complete assignments and meet established deadlines.

**INCUMBENT STATEMENT: I have discussed the duties of this position with my supervisor and have received a copy of the duty statement.**

INCUMBENT NAME (PRINT)

INCUMBENT SIGNATURE

DATE

**SUPERVISOR STATEMENT: I have discussed the duties of this position with the incumbent.**

SUPERVISOR NAME (PRINT)

SUPERVISOR SIGNATURE

DATE

