



- Current
- Proposed

Civil Service Classification: Analyst II
Working Title: Training Analyst
Division Branch Name: Division of Home & Community Living – Person Centered Navigation Branch
Incumbent: VACANT
Position Number: 797-732-5393-967
Effective Date:
Conflict of Interest (COI): Y
FLSA Status: Non-Exempt
CBID: R01
Tenure: Permanent
Time Base: Full-Time

You are a valued member of the department’s team. All CDA employees are expected to work collaboratively with internal and external stakeholders to enable the department to provide the highest level of service possible. Your efforts to treat others fairly, honestly, and with respect are important to everyone who works with you. We value diversity at CDA and we strive to achieve equity and inclusion in the workplace for all employees. We believe that a diverse workforce and inclusive workplace culture enhances the performance of our organization and the quality of representation that we provide to a diverse client base.

DESCRIPTION:

Under direction of the Health Insurance Counseling and Advocacy Program (HICAP) Section Chief (Supervisor II), the Analyst II is the lead analyst responsible for planning, coordinating, and administering HICAP Section team sponsored trainings, workgroups, and stakeholder meetings. This position supports Area Agencies on Aging (AAA), local HICAP programs and registered HICAP counselors paid and volunteer staff. The Analyst II works collaboratively in a team environment and must have high levels of analytical, as well as written and oral communication skills. Statewide travel may be required up to 15% of the time to provide training to local programs, ensure training standards are met, and participate in training related events such as Train the Trainer sessions and skills building courses.

ESSENTIAL JOB FUNCTIONS:

40% Training Research, Planning, and Content Development

Maintains an up-to-date understanding of Medicare and related health insurance, Medi-Cal for dual eligible beneficiaries, Long-Term Care Insurance and corresponding federal and state insurance laws, regulations, and policies affecting Medicare beneficiaries. Conducts research and participates in ongoing training to collaborate with subject matter experts and develops person-centered training courses (in-person, virtual, and on-demand e-learning), resource materials and counseling guidance using Microsoft Office and Adobe tools, ensuring consistency in counseling knowledge among CDA registered HICAP counselors.

Analyzes proposed and final changes to federal and state insurance laws, regulations, and policies, upon release, to revise existing HICAP Section training courses, resource materials, and counseling procedures, ensuring HICAP service providers have access to accurate and up-to-date guidance. Develops and revises complex statewide training and guidance materials based on research and analysis of federal and state statutory and regulatory requirements, program policies, and diverse stakeholder input. Materials include PowerPoint presentations, eLearning modules, teaching notes, evaluation tools, and program procedures for HICAP. Collaborates with HICAP Section team members and other internal and external partners to develop and annually update person-centered training courses, resource materials, and counseling guidance for AAA and HICAP service providers in order to improve service quality and program performance.

Organizes in-person and virtual stakeholder engagement opportunities using Zoom and Microsoft Teams up to multiple times per month in order to ensure that HICAP Section training plans, training courses, resource materials, and program guidance incorporate diverse perspectives and are in alignment with the needs of local partners. Develops, designs, and analyzes training courses and resource materials using instructional design principles to ensure accurate, consistent, and effective program implementation. Provides program oversight of State and local HICAP service provider training and outreach materials and applies analytical judgment to ensure statewide consistency, factualness, regulatory compliance, and alignment with program objectives, while ensuring all externally published materials meet Americans with Disabilities Act (ADA) accessibility standards using Microsoft Office and Adobe Acrobat applications.

On a semiannual basis, analyzes, recommends, and submits to the HICAP Section Chief locally-developed HICAP training and outreach materials to be adapted into templates that meet CDA communication standards to be shared with the state HICAP and national State Health Insurance Assistance Program (SHIP) network.

30% Training Logistics, Execution, and Evaluation

Coordinates with internal and external stakeholders to plan, prepare, and execute a range of training events, including individual online training courses, single-day in-person/virtual sessions, and multiple-day in-person/virtual training conferences. Designs and delivers session using diverse format such as instructor-led presentations, panel discussions, and peer-learning

activities to ensure attendees are equipped to train local HICAP counselors on updated Medicare and related health insurance information and to implement best practices from other HICAP service providers.

Plans and schedules the HICAP Section's calendar of events to avoid conflicts and maximizes participation to mitigate risk of calendar conflicts with other important dates. Develops and implements communication plans for HICAP Section sponsored events to ensure event attendees and participants are provided with attendance information in an organized and timely manner in order to maximize event attendance and engagement. Coordinates and monitors the development of presentation materials for HICAP sponsored events in order to ensure final products have completed internal review and are provided to attendees in advance of event dates. Coordinates with internal partners to ensure that onsite events are planned and executed with the appropriate facility resources (e.g., conference room reservation, room and IT equipment setup, and audio/visual setup) in order to deliver trainings and meetings that are productive and achieve their intended outcomes. Coordinates with internal partners to ensure that virtual/hybrid events are planned and executed with the appropriate videoconferencing and/or eLearning resources (e.g., Zoom, Microsoft Teams, Learning Management System) in order to deliver trainings and meetings that are productive and achieve their intended outcomes.

Designs and administers post-event surveys using Microsoft Forms and SurveyMonkey, and other tools that collect feedback for continuous improvement. Analyzes feedback and event outcomes and prepares summary reports with recommendations for management and the HICAP Section to enhance learning outcomes, attendee engagement, and program effectiveness.

10% Technical Assistance and Customer Support

Coordinates with CDA Learning Management System support staff to provide guidance and technical assistance to the HICAP Section team and partners in designing, developing, and maintaining training content and resources to ensure materials align with program objectives, support statewide priorities, and comply with federal and state program requirements. Completes semiannual quality assurance reviews of training records in the CDA Learning Management System, HICAP data system, and federal State Health Insurance Assistance Program (SHIP) data system to report on data entry errors or inconsistencies and recommendations for corrective action in order to improve data quality and compliance with state and federal program standards. Provides analytical support to the HICAP Section team in updating the HICAP Counselor Handbook, HICAP Program Manual, HICAP data system guidance, and other guidance documents for AAAs and local HICAP programs. Provides technical assistance, consultation and guidance to local HICAP programs via email, in person, and verbal communication, applying subject matter expertise and analytical judgment to resolve complex program and service delivery questions based on established program guidance and collaborate closely with management to ensure consistent, accurate, and compliant counseling service support across local HICAP programs.

10% Contract Oversight

Services as the main point of contact for HICAP training and conference Contracts. Analyzes the business needs, develops specifications and scope of work, and coordinates with vendors and presenters to ensure statewide consistency in counselor training. Monitors contract performance throughout the duration of active contracts to ensure expectations are met and requirements are satisfactorily adhered to. Reviews training and conference invoices upon receipt from vendors using the terms and conditions of individual training and conference contracts and state purchasing guidance and submit for supervisor approval.

5% Administrative and Data Management Duties

Analyzes and completes complex monthly administrative and data activities by reviewing reports, identifying trends, discrepancies, and opportunities for improvement, and recommending process enhancements to improve HICAP program operations and reporting accuracy. Corresponds with internal and external customers that contact the HICAP Section through shared inboxes and routes inquiries to assigned HICAP section lead staff persons based on subject matter expertise and/or program assignment in order to ensure timely responsiveness. Analyzes complex program-related questions by referencing state and federal requirements, existing program guidance, and available data in order to contribute to the HICAP Section's team decision-making process and write reports and recommendations that are data-driven and outcomes-based. Analyzes HICAP content of submitted AAA Area Plans and annual updates using CDA guidance documents and authors instructions for AAA staff to make revisions to comply with minimum expectations. On a semiannual basis, updates a catalog of program files on the Departments file sharing application that consists of approved training and outreach materials.

MARGINAL JOB FUNCTIONS:

5% Performs other job-related duties as assigned such as preparing and printing training and meeting materials, providing back-up coverage to the HICAP misdirected telephone line, and assisting with analysis of AAA HICAP monitoring desk-review documents.

TRAVEL: Up to 15% statewide travel required.

TYPICAL WORKING CONDITIONS:

The physical work location of the position is designated at the department's headquarters location, a three-story building and standard office modular workspace located in Natomas. The duties of the position require sitting for long periods of time while using a personal computer, reviewing documents, and attending meetings whether they are digital (i.e., Zoom, WebEx, MS Teams, etc.) or in person.



EQUAL EMPLOYMENT OPPORTUNITY:

The California Department of Aging is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

It is the policy of CDA to provide equal employment opportunity to all employees and applicants; those employees have the right to work in an environment free from discrimination; those consumers have the right to receive services free from discrimination in compliance with local, state, and federal laws.

To be reviewed and signed by the supervisor and employee:

SUPERVISOR’S STATEMENT:

- I have discussed the duties and responsibilities of the position with the employee.
- I have signed and received a copy of the duty statement.

Supervisor’s Signature and Date

Supervisor’s Name and Title

EMPLOYEE’S STATEMENT:

- I have discussed the duties and responsibilities of the position with my supervisor.
- I have signed and received a copy of the duty statement.
- I am able to perform the essential functions listed with or without reasonable accommodation (if you believe reasonable accommodation is necessary, discuss your concerns with your supervisor. If unsure of a need for reasonable accommodation, inform your supervisor who will discuss your concerns with Human Resources.)
- I understand that I may be asked to perform other duties as assigned within my current classification, including work in other functional areas as business needs require.

Employee’s Signature and Date

HUMAN RESOURCES BRANCH USE ONLY:

- Duties meet class specification and allocation guidelines.
- Exceptional allocation, STD 625 on file.

STATE OF CALIFORNIA
CALIFORNIA DEPARTMENT OF AGING
DUTY STATEMENT
CDA 9003 (REV 06/2024)



Analyst initials: PS/TB Date Approved: 2/17/26

Revision Date (if applicable): _____