

☒ Current ☐ Proposed

Classification Title Analyst IV	Division/Unit Benefits Division/Project Delivery Team/Customer Service and Support
Working Title Senior Project Manager	HQ Designation CalHR Sacramento
Position Number 363-500-5403-001	Date Prepared 03/19/2026
Name	Effective Date

CalHR Mission, Vision, and Values

The California Department of Human Resources (CalHR) is responsible for issues related to employee salaries and benefits, job classifications, civil rights, training, exams, recruitment and retention. For most employees, many of these matters are determined through the collective bargaining process managed by CalHR.

Our Mission: To serve as the trusted advisor to our strategic partners and the public, providing exceptional human resource services and guidance in developing a diverse and inclusive workforce.

Our Vision: Shaping California's future of public service excellence with fair and equitable employment opportunities and a diverse, engaged workforce.

CalHR Core Values: People Centric, Leadership, Accountability, DEIA, Integrity, and Transparency.

CalHR Benefits Division

The CalHR Benefits Division is responsible for the design, acquisition, and oversight of the statewide employee benefit programs. This includes dental, vision, flexible spending accounts, wellness, employee recognition, retirement, life, long-term disability and legal insurance, and other statewide benefit programs. Through effective stakeholder collaboration and partnerships, the division ensures the state employees, retirees and their dependents have access to competitive, quality, and affordable benefits. Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and contributes to maintaining a top-performing workforce.

General Statement

Under the direction of the Supervisor II, the Analyst IV's part of the Project Delivery Team under the Customer Service and Support Section, serving as the Senior Project Manager. The Analyst IV is responsible for managing complex, statewide projects and reporting using project management and process improvement methodologies to better serve public and state agencies' needs, ensuring alignment with the CalHR and Benefits Division mission, vision, values, and goals. The Analyst IV works collaboratively through open communication to complete assignments and projects, tracking project milestones, developing, and implementing action plans, and ensuring deliverables are met, effectiveness is measured, and processes are standardized. Without detailed supervision or review, and exhibiting significant independence of

action, duties include, but are not limited to:

Job Functions

[Essential (E) / Marginal (M) Functions] conducted [Onsite (O) / Virtually (V)]:

Percentage	(O) / (V)	Essential Job Duties
35%	OV	Project Management: Manage and complete assigned projects, ensuring all projects are completed within scope, budget, and timeline. Apply Lean or Lean Six Sigma concepts and techniques to projects. Identify and review business processes, risks, and recommend mitigation plans. Determine and deliver project tactics: identify project team roles and responsibilities; facilitate meetings, mitigate risks, implement strategies, update project plans and tracking systems to measure effectiveness, ensuring all stages of projects represent CalHR's interests. Provides regular project updates to the Supervisor II, and leadership team through continuous and direct communication.
25%	OV	Process Improvement: Work with Division managers to identify areas of improvement to enhance and/or better serve customers' needs. Apply Lean or Lean Six Sigma concepts and techniques to process improvement initiatives, including completing Lean/Six Sigma analyses and tasks. Conduct data gathering, best practice research, and process mapping. Share process improvement results with process owners and present recommendations to obtain leadership and stakeholder buy-in. Implement formal feedback process and monitor metrics to gather information on business performance to drive continuous improvement. Conduct post-process improvement performance analysis to ensure these processes are in support of organizational goals and modify as remain current with trends and customers' needs. Engage leadership and stakeholders and process owners to align process improvement initiatives with business objectives, execute projects and deliver results.
20%	OV	Research, Analysis and Reporting: Apply a high-level of project management and technical expertise with a broad understanding of program administration. Synthesize information from a variety of benefit disciplines to support a culture of data-driven decision-making that delivers efficient and effective statewide benefit services and programs. Research, interpret and analyze sensitive and complex data to measure program and/or project effectiveness. Remains abreast of industry standards and formulates recommendations that results in projects to successfully deliver alternative solutions to reach the desired outcomes. Utilize effective research methods and approaches, including Microsoft Office software, as applicable. Consistently monitor and track program data, identifying patterns and trends and develops reports to share results and recommendations. Research laws, regulations, and policies and partner with department coordinators, vendors, and carriers on options to enhance and ensure benefit program compliance. Makes recommendations on a board spectrum of administrative and program related issues. Assists with the preparation of programs' contracts, including the bid process, and renewals, monitors contractor performance, program development, utilization, invoices, outreach, and expenditures.

15%		Stakeholder Engagement: Establishes positive working relationships to successfully complete projects in alignment with the mission, vision, values, and goals. Facilitates stakeholder meetings and workgroups providing project management and technical expertise. Develops content for workgroups, taskforces, committees, and trainings, supporting an in-person, virtual and/or hybrid environment. Proactively provides project direction, reviews draft products, and communicates progress to leadership and project sponsors. Prepares and delivers presentations, and data visualizations. Serves as a change agent to implement strategies and communication plans to maximize adoption, through training, mentoring and guidance to foster a continuous improvement culture. Partners with benefits Broker on vendor and carrier initiatives. Collaborates with the Division management team to develop division-wide strategies for benefit related programs and represents the Division in internal and external initiatives.
Percentage	(O) / (V)	Marginal Job Duties
5%	OV	Other Duties: Performs other duties as required consistent with division needs. Participate in the development and implementation of the Division and/or Section's annual plan objectives and other special projects.

Supervision Received

The Analyst IV reports directly to the Supervisor II, however direction and assignments may also come from the Customer Service and Support Section Manager, Assistant Division Chief and Chief.

Supervision Exercised

The Analyst IV exercises no supervision. The Analyst IV acts as a project lead and assigns and monitors deliverables to the project team to meet division needs.

Special Requirements/Desirable Qualifications

The successful Analyst IV actively pursues development in the following areas:

- Interpersonal skills – conflict resolution, effective team behavior, adaptability, resilience, and helping behaviors, works effectively both independently and with others, manages projects flexibly and professionally, ability to master specific competency and skill levels.
- Communication skills – clear and concise verbal and written, presentation skills, meeting facilitation skills, and the ability/skill to engage customers.
- Dependability – meets deadlines, follows established Benefits Division procedures, and manages time and schedule effectively, receives strategic direction and takes action to achieve desired results, demonstrates a high degree of initiative and responsibility
- General business acumen – honest, ethical, tactful, systemic thinking, thoughtfully decisive and conscientious, maintains an open and learning mindset.

CalHR employees are expected to model and support CalHR Core Values.

Working Conditions

The duties of this position are performed indoors at the 1515 "S" Street building. The employees' workstation is equipped with standard or ergonomic office equipment, as appropriate.

To promote collaboration, team cohesion, and employee development, CalHR operates on a hybrid schedule, requiring staff to work on-site at least two (2) days per week. Effective July 1,

needed/required. This approach reflects our commitment to strengthening teamwork, building relationships, and advancing our mission to provide exceptional human resources leadership and services in the State of California.

Attendance

Employees must maintain regular and acceptable attendance, as determined solely by the Department. They must be regularly available on-site or virtually and willing to work the hours deemed necessary or desirable to meet the Department's business needs.

Employee Acknowledgement

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation (RA). * (If you believe an RA is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the RA Coordinator.)

*An RA is any modification or adjustment made to a job, work environment, or employment practice or process that enables an individual with a disability or medical condition to perform the essential functions of their job or to enjoy an equal employment opportunity.

Duties of this position are subject to change and may be revised as needed or required.

Employee Signature	Employee Name	Date

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature	Supervisor Name	Date