



Position Information

Employee Name:

Position Title:

Executive Program Analyst

Program:

Executive Office

Work Unit:

Executive Office

Classification:

Analyst II

Report To:

C.E.A.

Collective Bargaining Identifier (CBID):

R01

Fair Labor Standards Act (FLSA) Status:

Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

Our executive committee leads by example, living our core values and bringing a commitment to transparency and accountability to each decision and every action. The team benefits from extensive industry experience and their strong leadership and clear objectives guide the organization to deliver on our promise to be here for California businesses now and in the future.

Purpose/Scope:

Under direction of the C.E.A. (Senior Vice President of Executive Operations), the Analyst II (Executive Program Analyst) is the full journey level class, providing program support, staff support, and continuous improvement through analysis, recommendations/resolutions, coordination, and facilitation of operations and managements (i.e. planning, work-flow, budgeting, physical resources, systems) issues and projects. The Analyst II will provide support to other team members as needed.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct

- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Provide quality customer service in a timely manner.
- Take “ownership” of each customer contact to see needs are met and promises are kept.
- Help in the retention of all State Fund customers.
- Follow State Fund’s Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Meet all project deadlines.

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

25% Essential

1. Serve as Budget coordinator to facilitate the program’s budget planning process and resolution of position control and staffing issues, according to corporate time-frames and parameters.

- Coordinate the preparation and submission of the program’s annual (and mid-year) Budget Plan:
 - Provide accurate information, projected expenses and analysis to assist and guide Regional Vice President's through the annual (and mid year) budget planning process,
 - Compile and assure accuracy and consistency among Budget Plan documents (i.e. Personnel Expense Analysis, organization charts, and related worksheets) according to corporate parameters,
 - Acts as liaison between corporate programs coordinating the Budget Plan process (Financial Operations and Human Resources (HR)) and the management team,
 - Coordinate the responses/resolutions of Budget Plan issues and discrepancies that HR has identified or recommended, and
 - Act as P-card controller and process requisitions as needed.
- Facilitate the program's ongoing budget planning and review process:
 - Facilitate the management team’s review of the Budget Plan at least annually,
 - Develop and coordinate (collect and maintain) the program’s tracking database to monitor progress on Budget Plan goals and measurements at least twice annually,
 - Maintain ongoing review of program operating budget and expenses,
 - Prepare outcome/effectiveness reports and recommend strategies for improvement,
 - Process and track payment of invoices, 594’s and purchase orders according to Corporate policies and procedures, and
 - Process and track travel expense claims according to Corporate policies and procedures.
- Coordinate the program’s reconciliation and resolution of position control and staffing issues:
 - Maintain changes to Budget Planning documents (PEA, organization chart) resulting from program reorganizations, position reclassifications, authorized position changes,
 - Coordinate resolutions of discrepancies in authorized (budgeted) positions in consultation with the hiring supervisor and HR, and
 - Amend Budget Plan documents (PEA, organization chart, related worksheets and exhibits) as needed.

20% Essential

2. Provide administrative support to assigned executives and/or other executive officers.

- Handle confidential matters for the assigned executives.
- Coordinate assigned executive officers’ schedule.

- c. Prepare and deliver (report of) analysis and recommendations/alternatives/solutions.
- d. Receives clients and State Fund staff both in person and by telephone and provide them with information as required.
- e. Manage assigned executives travel plans.
- f. Process assigned executives travel expense claims.

20% Essential

3. Provide analytical support to assigned executives and their staff in all areas related to the functions being performed in the unit.

- a. Analyzes and resolves complaints directly or indirectly through executive officers' directs.
- b. Initiates correspondence, follow-up, and maintain records of all contact made on behalf of the assigned executive officers.
- c. Update and develop written procedures, policies and guidelines in a timely manner and are consistent with operating practices.

15% Essential

4. Conduct research/analysis/studies of the assigned executives' operational and management issues; develop recommendations/alternatives/solutions and implement as appropriate.

- a. Define/determine the issue/problem/project and resources, stakeholders, time-frames and parameters.
- b. Conduct research and data analysis and maintain documentation.
- c. Develop recommendations, alternatives and/or solutions, including fiscal, organizational, staffing, and policy considerations for the program, and statewide impact to other regions/programs.
- d. Prepare written reports and presentations.
- e. Implement as appropriate or directed:
 - i. Develop procedures; policies; customized applications, databases, and forms; and benchmarks as appropriate,
 - ii. facilitate/provide communication and training as appropriate,
 - iii. Monitor and report implementation outcomes, and
 - iv. Address/resolve issues and propose improvements as needed/appropriate.

15% Essential

5. Initiate the development and continuous improvement of the program's policies, procedures, practices, reports and systems.

- a. Identify and analyze opportunities for improvement and bring to the attention of assigned executives.
- b. Prepare and deliver (report of) analysis and recommendations/alternatives/solutions.
- c. Develop, run, and maintain customized applications, reports, records/database, and forms.

5% Essential

6. Coordinate/Serve as liaison with Information Technology, Financial Services and Real Estate management staff on projects and problems.

- a. Oversee and expedite timely responses and follow-up for the program's employees.
- b. Coordinate with external parties and corporate programs as needed.

100%

Required Knowledge Areas:

- Working knowledge of State Fund standard software applications.
- Proficient knowledge of State Fund organization, Regional Office and corporate (support) functions and business policies and practices, including the budget planning process, Corporate Guideline manual, Fleet Safety

Program, State Fund Motor Vehicle Operators' Guide, and Office Services Procedure Manual (Chart of Accounts).

- Working knowledge of project management principles.

Required Skills and Abilities:

- Ability to research, analyze, and evaluate information to make and support decisions.
- Ability to manage multiple projects and tasks.
- Ability to coordinate, facilitate, and make presentations.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Ability to effectively work with and relate with other people.
- Ability to work independently and as a team with co-workers and management to address and resolve issues.
- Ability to resolve sensitive issues and problems.
- Ability to write professional and accurate reports and other communications suitable for distribution to internal and external customers.
- Ability to achieve results according to objectives.
- Ability to handle high pressure situations while being firm but tactful.
- Ability to gain and maintain the confidence and cooperation of those contacted during the course of work.

Work Environment:

Physical Requirements:

- Incumbent works in the usual office environment.

Travel:

- Travel may be required.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.

Supervisor’s Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):	Supervisor Signature:	Date:

Employee’s Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):	Employee Signature:	Date: