

POSITION DUTY STATEMENT

DFPI-HR0 203 (Rev. 08-21)



NAME [Employee]	EFFECTIVE DATE [Actual Start Date]
CLASSIFICATION TITLE Analyst II	POSITION NUMBER 410-101-5393-XXX
WORKING TITLE Executive Analyst II	DIVISION/OFFICE/UNIT/SECTION Executive Division/ Executive Support Section
BARGAINING UNIT R01	GEOGRAPHIC LOCATION Sacramento

General Statement: Under the direction of the Supervisor I (Executive Operations Director), the Analyst II performs a wide variety of complex and highly sensitive analytical, administrative, project coordination, and executive support functions for the Department of Financial Protection and Innovation (DFPI). The incumbent serves as a key member of the Executive Support Section and provides administrative and analytical support to the Commissioner, Chief Deputy Commissioner, Deputy Commissioners, Executive Leadership Team, and Business, Consumer Services Agency (BCSA) executives, as assigned.

The incumbent independently conducts research, analyzes sensitive issues, coordinates executive-level projects, develops reports and correspondence, tracks assignments, facilitates executive meetings, and assists with department-wide initiatives. The position requires excellent judgment, discretion, organizational skills, and the ability to work effectively with executives, internal stakeholders, external partners, control agencies, and legislative offices. The incumbent must demonstrate excellent communication skills, both orally and in writing, and have a high proficiency in Microsoft Office Suite, and computer knowledge. Develop and maintain effective working relationships with numerous private and government agencies, authorities, boards, and commissions, as well as the public. Travel between the Sacramento and San Francisco headquarter offices is required. Duties include, but are not limited to:

A. Specific Assignments [Essential (E) / Marginal (M) Functions]:

35% (E) Executive Support and Administrative Coordination

Coordinates time sensitive executive calendars, meetings, appointments, travel arrangements, and event logistics. Monitors executive correspondence, assignments, and action items to ensure timely completion. Independently prepares briefing materials, background information, executive summaries, talking points, presentations, reports, and meeting packets.

Coordinates the more complex and politically sensitive responses to inquiries from the Governor's Office, BCSA, Legislature, control agencies, stakeholders, and external partners. Drafting, reviewing, and editing correspondence, memoranda, reports, presentations, and other executive communications.

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Maintaining confidential and sensitive information with a high degree of discretion. Managing executive records and tracking systems to ensure accountability and follow-up. Drafts agendas for Executive Staff meetings, coordinate meetings, facilitate meetings, and post-meeting summaries. Participate in Executive Staff meetings.

35% (E) Program Analysis and Project Coordination

Independently conducts research and analysis on time sensitive and confidential administrative, operational, legislative, budgetary, organizational, and policy issues. Gathers, compiles, and evaluates complex data to support executive decision-making. Develops recommendations, reports, issue papers, and briefing documents for executive leadership. Independently monitors project timelines, deliverables, and milestones. Coordinates cross-divisional projects involving executive leadership, program staff, and external stakeholders. Assists in the implementation of strategic initiatives and special assignments.

15% (E) Executive Meeting Support

Schedules and organizes executive meetings, leadership meetings, stakeholder meetings, and special events. Prepares agendas, meeting materials, presentations, and supporting documentation. Attends meetings as assigned and preparing meeting notes, action items, and follow-up communications. Tracks assignments resulting from executive meetings and ensuring timely completion. Assists with preparations for public meetings, legislative hearings, conferences, and executive presentations. Coordinating logistics with BCSA, state control agencies, and external organizations.

10% (E) Communications, Reporting, and Stakeholder Coordination

Incumbent serves as key point of contact to the Executive Staff and, as such, interacts with legislators, the Governor's Office, and key federal level contacts. The incumbent is required to have an intimate knowledge of the diverse and distinctive issues facing departmental programs. Incumbent advises and consults with the Directorate regarding the latest facts or proposals received via these communications and contacts, which often have political and economic implications.

Develops reports, dashboards, spreadsheets, and presentations for executive leadership. Coordinates information requests and collecting data from divisions and offices throughout the department. Assists with preparation of executive communications, announcements, and informational materials. Serves as a liaison with internal and external stakeholders regarding executive assignments and projects. Tracking and reporting status of high-priority initiatives and assignments.

5% (M) Other Duties as Assigned

Participates on departmental workgroups, committees, and special projects.

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Assists with emergency response, continuity of operations, and special department initiatives.

Provides backup support to other Executive Support Section staff as necessary.

Performs other related duties consistent with the classification.

B. Supervision Received

The Analyst II reports directly and receives the majority of assignments from the Executive Operations Director; however, direction and assignments may also come from the Commissioner, and the Chief Deputy Commissioner, Executive Staff, or the Business, Consumer Services Agency.

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The incumbent has frequent contact with DFPI Executives, key departmental management and staff on issues ranging from very general to sensitive and confidential. Additionally, has regular interaction with staff from the Governor's Office, BCSA, and the Legislature, representatives, and heads of private and other governmental agencies with elected and appointed officials.

F. Actions and Consequences

The actions of the incumbent have a direct bearing on the operational effectiveness, and overall impression, of the entire department.

G. Functional Requirements

The incumbent works 40 hours per week in an office setting, with artificial light and temperature control. The use of a personal computer, telephone, copier, and fax machine is essential to the duties of this position. The position requires bending and stooping to retrieve files, sitting and standing consistent with office work, and light lifting of no more than 25 lbs.

Frequently:

- Sitting at a desk, in a chair, and in front of a computer screen.
- Moving/walking about the office and standing or sitting during in meetings.
- Using a multi-line telephone console or a cordless telephone with headset.
- Utilizing MS Teams to connect with HRO and DFPI staff during remote working.

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- Bend (neck and waist), squat, kneel, and twist (neck and waist). Reaching (above and below shoulder level).
- Perform repetitive hand motion, simple grasping, fine manipulation, pushing and pulling with right and left hands.
- Travel between the Sacramento and San Francisco headquarter offices is required (Travel between the San Francisco and Sacramento offices is required. If position is headquartered in San Francisco, travel will be required to the Sacramento office several days a month. If the position is headquartered in Sacramento, travel will be required to San Francisco 2-3 days a week).

H. Other Information

Knowledge of: Principles, problems, and methods of public and business administration, including organization and personnel and fiscal management; office management principles, methods, and procedures; administrative survey techniques and skill in their application; statistical and research methods.

Ability to: Think clearly and quickly and analyze and solve problems of organization and management; work independently in identifying the need for and developing proposed changes to operating practices, programs, and policies; supervise the staff of an administrative office; establish and maintain cooperative working relationships; speak and write effectively.

CONFLICT OF INTEREST

This position is subject to Title 10, § 250.30 of the California Code of Regulations, the Department of Financial Protection and Innovation's Conflict of Interest Regulations, the incumbent is required to submit a Statements of Economic Interests (Form 700) within 30 days of assuming office, annually by April 1st and within 30 days of leaving office.

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I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation 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 Health & Safety analyst.)

Employee Signature

Date

Employee's Printed Name, Classification

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

Date

Supervisor's Printed Name, Classification