



POSITION DUTY STATEMENT

California Student Aid Commission
State of California

☒ Current

☐ Proposed

Date Revised

Date: July 24, 2026	Name of Incumbent: Vacant
Civil Service Title: Analyst III	Position Number: 270-734-5402-XXX
Working or Job Title: Workforce and Equity Specialist	Division/Unit: FASD/Workforce & Equity
Supervisor's Civil Service Title: Manager II	Location: Rancho Cordova and/or Sacramento
Supervisor's Working Title: Director, Administrative Services	Work Hours/Shift: 8:00 a.m. - 5:00 p.m.
Conflict of Interest Disclosure Position: ☐ Yes ☒ No	License or Other Requirement: N/A
Bilingual Position (Specify Language): ☐ Yes _____ ☒ No	Public Contact Position: ☐ Yes ☒ No
Supervision Exercised: N/A	
This role is critical to accomplishing CSAC's established goals to advance equitable student access, support and success and you are a valued member of the California Student Aid Commission's (CSAC) team. You are expected to work cooperatively with team members and others to enable CSAC to provide the highest level of service possible. Your creativity and productivity are encouraged. Your efforts to treat others fairly, honestly and with respect are important to everyone who works with you.	
CSAC MISSION STATEMENT	
CSAC is the principal state agency responsible for administering financial aid programs for students attending public and private universities, colleges, and vocational schools in California. Its central mission is to make education beyond high school financially accessible to all Californians.	
PROGRAM INFORMATION	
The Fiscal and Administrative Services Division's (FASD) mission is to provide exceptional customer service in the areas of budgeting, human resources (HR), accounting, and business services while abiding by laws, regulations, and proper business practices that guide our operations. Our professional staff oversees Labor Relations, Equal Employment Opportunity (EEO) compliance, Diversity, Equity, Inclusion, and Accessibility (DEIA) Program, staff development, health and safety, recruitment, classification and pay, organizational development, problem solving, leadership systems, policy development, process/productive improvement, training, and performance management.	

SUMMARY STATEMENT

Under the general direction of the Manager II, the Director of Administrative Services, the Analyst III strengthens staff and leadership capacity in core equity concepts and advises mid-level and senior leaders on policies and practices that promote equitable opportunities for all CSAC employees. The role requires an experienced and respected equity advocate who can effectively train and guide teams to foster an inclusive work environment. This cross-divisional work directly supports the Agency's mission and vision for Equity in Access, Equity in Support, and Equity in Success.

The Analyst III will perform complex duties for CSAC's DEIA, EEO, and Workforce and Succession programs with project management authority. The incumbent may be responsible for sensitive and confidential matters and requires the use of tact and sound judgment that recognizes the best interests of the state and the CSAC. The Analyst III reports directly to and is supervised by the Director of Administrative Services but may receive directions and assignments from the Deputy Director.

ESSENTIAL FUNCTIONS (E) – MARGINAL FUNCTIONS (M)

%	Job Descriptions
30% (E)	Diversity, Equity, Inclusion & Accessibility Lead CSAC in the adoption and implementation of the DEIA program. Responsible for developing a results-oriented approach that continually and systematically reviews, analyzes, and strengthens CSAC's staff members representing the whole organization, the supervisors and the executive staff. The focus includes evaluating CSAC's policies, procedures, practices and training in determining the impact on individual staff, divisions and the agency. Lead in the development and execution of action plans to support the process. Responsible for staying up to date on the latest strategic approaches to leading with DEIA, including attending training, forums, and workgroups regarding DEIA. This may include coordination of the activities of the DEIA program, including the preparation and processing of agendas, notices, and applications. Facilitate communications and outreach by collaborating at varying levels of the agency to foster employee engagement and participation. Create, review and route materials for approval as required. Responsible for finding content or persons of interest relevant to the work and goals of the program and is the point person for vendors, consultants and/or contractors.
30% (E)	Workforce and Succession Planning Collaborates with FASD leadership and the HR Office to collect and analyze data related to workforce trends, turnover rates, and employee performance to inform planning efforts. Assesses current workforce demographics, skills, and capabilities to identify gaps and areas for improvement by utilizing statewide data, the Management Information Retrieval System (MIRS) reports, survey results, and other CSAC and State resources. Develops and implements succession plans to ensure that critical roles are filled in the event of retirements, resignations, or promotions. Coordinates with various internal and external stakeholders to gather input and foster collaboration on workforce initiatives; prepares reports and presentations to communicate workforce and succession planning strategies to leadership; ensures that all workforce planning and succession activities comply with relevant laws, regulations, and CSAC policies; and evaluates the effectiveness of workforce and succession strategies and makes recommendations for improvements.

	Collaborates with the HR Training Coordinator to create programs that enhance employee skills and prepare them for future roles. Drafts and updates policies related to workforce planning and succession to align with agency goals and state regulations; and facilitates mentorship and coaching programs to support the development of potential leaders within the organization. Oversee the planning, development, and delivery of management training specific to CSAC leadership staff related to DEIA, EEO and Workforce and Succession planning initiatives. Training modalities can include in-person, virtual (delivered via Teams, Zoom, etc.), and the CSAC's Learning Management System.
20% (E)	Special Projects Provides leadership and coordination in the planning and implementation of various special projects and initiatives related to Personnel and agency goals. Leads and implements project plans; evaluates project status and resource utilization and implements changes to improve effectiveness; communicates and interacts with internal and external stakeholders related to each project via Outlook, Teams, Zoom and other communication platforms. Research, evaluates, and analyzes Personnel project requirements and processes that have potential impact on operations; generate reports summarizing business or financial data for discussions, projections, and strategic recommendations in response. Reviews and ensures accurate completion and timely submission of projects and/or reports as required, with respect to assigned areas of responsibilities.
10% (E)	Equal Employment Opportunity Ensures the agency adheres to EEO laws and regulations, including federal, state, and local laws; analyzes workforce data to identify trends and potential areas of discrimination or bias, such as hiring practices or promotions; and assists in the development and implementation of EEO policies, practices, and training programs. Lead investigations for the agency in various allegations, complaints, studies of discrimination, harassment, sexual harassment, abusive conduct, retaliation, workplace violence, and management inquiries. Review and analyze complaints and allegations to determine whether complaints fall within the EEO Office's jurisdiction and provide timely referrals to other jurisdictions as appropriate. Communicate, mediate, and negotiate resolutions in the complaint process. Develop an investigative plan for the complaint and independently conduct a complete in-depth unbiased investigation. Comply with chain of custody policies and procedures, when applicable. Develop and prepare appropriate reports and letters. Provide recommendations for appropriate action and/or remedies for resolution. Communicate with complainants, respondents, witnesses, representatives, other governmental agencies, and/or individuals throughout the investigative process. Conduct exit and/or other interviews as necessary. Inform EEO Officer of emerging employee complaints/concerns and provide recommendations for resolution. Monitor incoming messages, timely addresses complaints, issues, and concerns. Update California Department of Human Resources' (CalHR) Discrimination Complaint Tracking System (DCTS) and prepare the EEO Office for the submission of DCTS quarterly reports. Log, track, and develop documentation for all complaints and investigations in internal tracking systems and the DCTS. Present reports, case information, and investigation outcomes to the EEO Officer and identified parties. Participate and attend legal administrative hearings and proceedings.

5% (E)	Coordinates the activities of the State's Employee Assistance Program (EAP) by informing staff of training, distributing monthly information from our EAP provider, and providing programs with details on special EAP services.
5% (M)	Performs other job-related duties as assigned, consistent with the classification specifications of the Analyst III classification and in support of the Agency's mission and organizational initiatives. This includes contributing to special projects cross-divisionally that support vision driven goals.
IMPACT AND CONSEQUENCE OF ERROR	
Significant policy misinterpretation reflects poorly on the incumbent, team members and the agency, and diminishes credibility with key stakeholders.	
PROFESSIONAL CONTACTS	
• Frequent contact with CSAC staff at all levels. • Frequent contact with other state agencies and various levels of government. • Frequent contact with the public.	
OTHER SPECIAL EXPECTATIONS	
• Works independently and exhibit proactive behavior with limited supervision or instruction. • Effectively collaborates with others as a member of a team. • Strong oral and written communication skills, particularly in the areas of presentation and facilitation. • Strong analytical, organizational, presentation, and research skills, utilizing search engines and web/internet tools. • Positive attitude, open-mindedness, flexibility, tact, and confidentiality. • Commitment to providing high-quality service that exceeds expectations. • Focused attention to detail and ensures follow-through. • Performs multiple tasks simultaneously, adhere to deadlines, and adapts to shifting priorities in a collaborative fashion. • Effectively use professional judgment on sensitive or confidential circumstances and handles information with discretion and professionalism. • Maintains good attendance and punctuality record. • Consistently demonstrates a high level of initiative and sound judgment. • Assess a situation and implements an appropriate and efficient plan of action. • Proficient in computer technology such as Microsoft Word, Outlook, Excel, and PowerPoint, and various software programs. • Effectively communicates information with confidence and politeness while utilizing concise and clear language within a diverse community. • Effectively utilizes division and CSAC technology and data tools with technical proficiency.	
AMERICANS WITH DISABILITIES ACT (ADA) REQUIREMENT	
Alternatives will be provided for those who are unable to perform the essential functions of the job due to the disability covered under the ADA.	

PHYSICAL AND ENVIRONMENTAL WORKING CONDITIONS

- Exposure to computer screens and other basic office equipment.
- Work in a climate-controlled office environment, open office space with artificial lighting.
- Attend meetings in designated conference rooms and be willing to travel to off-site locations.
- Current residency in the State of California is required. This position's location is designated in Rancho Cordova and/or Sacramento, CA and may be eligible for hybrid teleworking. The amount of telework is at the discretion of the Department and based on the CSAC's current telework policy. While CSAC supports telework, regular in-person attendance will be required at CSAC's Rancho Cordova location based on operational needs. Teleworking from outside the State of California is strictly prohibited.

EMPLOYEE ACKNOWLEDGEMENT

I have read and understand all the requirements and information above and discussed the duties listed above with my supervisor and can perform them either with or without reasonable accommodation (RA). If you believe you may require RA, please discuss this with your hiring supervisor. If you are unsure whether you require RA, inform the hiring supervisor who will discuss your concerns with the RA Coordinator.

Employee Signature

Date

SUPERVISOR ACKNOWLEDGEMENT

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

HUMAN RESOURCES OFFICE APPROVAL

☒ Duties meet class specifications and allocation guidelines.

☐ Exceptional Allocation, form 625 on file.

HR Analyst Initials

RM

Date Approved

08/14/26

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