

DUTY STATEMENT

(07/14)

*Shaded area for Personnel Office use only***Effective Date:**

1. OFFICE State Coastal Conservancy		POSITION NUMBER (Agency - Unit - Class - Serial) 536-100-5393-XXX	
2. HEADQUARTER LOCATION Oakland, CA		3. CLASS TITLE Analyst II	
4. WORKING HOURS/SCHEDULE TO BE WORKED 8:00 a.m. to 5:00 p.m., Monday to Friday		5. SPECIFIC LOCATION ASSIGNED TO Oakland, CA	
6. PROPOSED INCUMBENT (If known)		7. CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)	
All employees are expected to work cooperatively with others; maintain regular, consistent, and predictable attendance; possess integrity, initiative, dependability, and good judgment.			
8. BRIEFLY (1 - 3 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of Human Resource Manager, the incumbent performs a variety of analytical, administrative, technical, and secretarial tasks for the State Coastal Conservancy (Conservancy), including the Human Resources Unit. Incumbent will primarily perform analytical duties in all the major human resources functions including employee learning and development, training, performance management and personnel transactions, and represent the Conservancy in HR capacity. Work assignments include but are not limited to auditing employee personnel records to ensure compliance with the Records Retention Policy, applying State laws and departmental and control agency rules and regulations, and bargaining unit provisions pertaining to a variety of personnel transactions in the areas of personnel record keeping, certification, payroll, and personnel documents processing and related personnel transactions functions. Maintaining privacy, confidentiality, and security is of highest importance.			
9. Percentage of time performing duties		10. Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>	
35%		ESSENTIAL FUNCTIONS In all job functions, employees are responsible for creating an inclusive, safe, and secure work environment that values diverse cultures, perspectives, and experiences, and is free from discrimination. Employees are expected to provide all members of the public with equitable services and treatment, collaborate with underserved communities and tribal governments, and work toward improving outcomes for all Californians.	
25%		Training Coordinator Functions - Support the HR Manager in developing, implementing, and maintaining the Conservancy's learning and development programs. - Provide staff with current information about CalHR courses and external training opportunities; assist employees in selecting appropriate courses. - Track all staff and Board trainings, notify individuals of required mandatory trainings, collect certificates, and update training records in a timely manner. - Ensure proper supervisor approval before registering employees for courses in CalLearns, conferences, or external training platforms. - Complete payment processing tasks, including preparing IORs. - Submit required training reports and documentation to CalHR per CalLearns Training Information System (CTIS) reporting guidelines.	
		Performance Monitoring and Reporting - Monitor performance management workflows to ensure compliance with duty statements, performance timelines, and annual review processes. - Track and issue probationary report reminders; collect completed probation reports and escalate overdue items as needed.	
11. SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE			
SUPERVISOR'S NAME (Print)		SUPERVISOR'S SIGNATURE	
		DATE	
12. EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT			
The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise to balance the workload.			
EMPLOYEE'S NAME (Print)		EMPLOYEE'S SIGNATURE	
		DATE	

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15% 15% 5% 5% 100%	ESSENTIAL FUNCTIONS - Maintain accurate, up-to-date records for duty statement changes, performance appraisals, and all performance-related documentation. - Coordinate with managers and supervisors when duty statements require updates, ensuring revisions follow CalHR and internal guidelines, including correct duty descriptions, essential functions, and percentage allocations HR Records and Retention Coordinator: - Assist with preparing, filing, and documenting appointments, separations, and other personnel transactions to support State Personnel Board compliance review audits and Public Records Act requests. - Maintain official personnel files and employment history records in alignment with the State Administrative Manual, the Personnel Manual, and requirements from the California Department of Human Resources, the State Personnel Board, the State Controller's Office, and the agency's retention procedures. - Track required personnel documents, including probationary reports, individual development plans, performance appraisals, onboarding documents, duty statements, and annual policy acknowledgment forms. - Ensure records are organized, complete, and accessible for review or audit Administrative Coordination: - Coordinate quarterly union leave reporting and prepare SEIU Union Billing summaries; transmit documentation to Accounting for accounts receivable processing. - Distribute staff surveys at the direction of the HR Manager or Executive Management; track survey completion and maintain related files. - Maintain day-to-day updates to Official Personnel Files (OPFs), including filing new documents, verifying completeness, and processing routine record requests. - Serve as the Employee Assistance Program (EAP) Coordinator, communicating available tools, resources, and services to staff. - Collaborate with team members to assist with and reconcile items related to Accounts Receivable via State Controller's Office system (SCO). Form 700 Compliance Management - Oversee and manage the annual Form 700 filing cycle, including preparing announcements, tracking filer completion, and producing compliance status reports for Executive Management. - Identify non-compliant filers, issue notifications, and recommend follow-up actions consistent with Fair Political Practices Commission (FPPC) rules and internal procedures. - Maintain electronic copies of Form 700 filings to support audits, Public Records Act requests, subpoenas, or litigation holds. Marginal Duties: - Participate in professional development training, as well as tasks, trainings and activities that support programmatic and workplace diversity, equity, and inclusion. - Serves as a backup to other staff in the unit for cross training purposes when necessary; may include other sensitive HR tasks as assigned including coordinating scheduling, managing shared inbox tasks, and assisting with special projects assigned by HR management.

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	KNOWLEDGE AND ABILITIES Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization. Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during work. DESIRABLE QUALIFICATIONS • Excellent professional written and verbal communication skills. • Proficient with using Microsoft (MS) Office Suite, including Excel, Teams and Word. • Experience researching and analyzing complex situations and data, identifying potential solutions, and providing sound recommendations • Ability to effectively manage competing priorities, shifting deadlines and perform a variety of tasks efficiently and with accuracy and attention to detail. • Ability to interpret and accurately apply laws, rules, regulations and procedures as it relates to HR processes • Ability to exercise good judgment under pressure and adapt to changing priorities • Ability to work independently, take initiative, assume increasing responsibility, and streamline procedures SPECIAL PERSONAL CHARACTERISTICS Willingness as a learner to do routine or detailed work in order to learn the practical application of administrative principles; and demonstrated capacity for development as evidenced by work history, academic attainment, participation in school or other activities, or by well-defined occupational or vocational interests; and willingness/ability to accept increasing responsibility. WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES <u>Work Environment</u> • Position Headquarters (HQ) is in a high-rise building in Oakland, CA. • Office setting; Monday through Friday; prolonged periods of sitting. • Work on a computer up to 8 hours a day. • Ability to lift up to 15 pounds with accommodation as needed. • Indoor work is common, although outdoor work may be necessary. • May require an employee to work in adversarial situations. • Multitask, meet deadlines, and adjust to changing priorities in a cooperative manner. • Travel by car or plane, with overnight stays necessary on occasion as necessary. • Telework available per department and state guidelines • Maintain security, privacy, and confidentiality when working. <u>Physical Ability</u> • Talking, seeing, and hearing are essential to performing the job requirements. • Common eye, hand and finger dexterity is required for most essential functions. <u>Mental Ability</u> • Understand written and verbal communication and instructions. • Must always maintain a professional demeanor and remain calm under pressure. • Add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. • Apply common sense understanding with instructions furnished in written/oral/diagram form. • Deal with problems involving several concrete variables in standardized situations.

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	<u>Reading:</u> Understand and use written information that may be presented in a variety of formats, such as text, tables, lists, figures, and diagrams; select reading strategies appropriate to the purpose, such as skimming for highlights, reading for detail, reading for meaning, and critical analysis. <u>Writing:</u> Express ideas and information in written form clearly, succinctly, accurately, and in an organized manner; use English language conventions of spelling, punctuation, grammar, and sentence and paragraph structure; and tailor written communication to the intended purpose and audience. <u>Organizing and planning:</u> Organize and structure work for effective performance and goal attainment; set and balance priorities; anticipate obstacles; formulate plans consistent with available human, financial, and physical resources; modify plans or adjust priorities given changing goals or conditions. <u>Using social skills:</u> Interact with others in ways that are friendly, courteous, and tactful and that demonstrate respect for individual and cultural differences and for the attitudes and feelings of others. <u>Adaptability:</u> Change one's own behavior or work methods to adjust to other people or to changing situations or work demands; be receptive to new information, ideas, or strategies to achieve goals. <u>Working in teams:</u> Work cooperatively and collaboratively with others to achieve goals by sharing or integrating ideas, knowledge, skills, information, support, resources, responsibility, and recognition. <u>Self and career development:</u> Identify own work and career interests, strengths, and limitations; pursue education, training, feedback, or other opportunities for learning and development; manage, direct, and monitor one's own learning and development. <u>Listening:</u> Attend to, receive, and correctly interpret verbal communications and directions through cues such as the content and context of the message and the tone, gestures, and facial expressions of the speaker. <u>Leading others:</u> Motivate, inspire, and influence others toward effective individual or team work performance, goal attainment, and personal learning and development by serving as a mentor, coach, and role model and by providing feedback and recognition or rewards. <u>Building consensus:</u> Build consensus among individuals or groups by facilitating agreements that involve sharing or exchanging resources or resolving differences in such a way as to promote mutual goals and interests; by persuading others to change their point of view or behavior without losing their future support; and by resolving conflicts, confrontations, and disagreements while maintaining productive working relationships. <u>Speaking:</u> Express ideas and facts orally in a clear and understandable manner. <u>Using information and communications technology:</u> Select, access, and use necessary information, data, and communications-related technologies, such as basic personal computer applications, telecommunications equipment, Internet, electronic calculators, voice mail, email, facsimile machines, and copying equipment to accomplish work activities. <u>Gathering and analyzing information:</u> Obtain facts, information, or data relevant to a particular problem, question, or issue through observation of events or situations, discussion with others, research, or retrieval from written or electronic sources; organize, integrate, analyze, and evaluate information. <u>Analyzing and solving problems:</u> Anticipate or identify problems and their causes; develop and analyze potential solutions or improvements using rational and logical processes or innovative and creative approaches when needed. <u>Making decisions and judgments:</u> Make decisions that consider relevant facts and information, potential risks and benefits, and short- and long-term consequences or alternatives. Some of the above requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodation.

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2. HEADQUARTER LOCATION Oakland, CA		3. CLASS TITLE Analyst I	
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25%	Training Coordinator Functions - Assist the HR Manager in carrying out the Conservancy's learning and development activities and training programs. - Provide employees with updated information on CalHR courses and external training options; assist staff in identifying courses that meet development needs. - Track completion of staff and Board trainings, send reminders for mandatory courses, collect certificates, and update training records. - Verify supervisor approval before registering employees for CalLearns courses, conferences, or other training platforms. - Prepare basic payment documents such as Intra-Office Requisition (IORs) for training expenses. - Assist with submitting required training information and reports to CalHR following CalLearns Training Information System (CTIS) reporting guidelines.		
	Performance Monitoring and Reporting - Track performance management timelines and assist with monitoring compliance with duty statements and annual evaluation requirements. - Send probationary report reminders to supervisors, collect completed reports, and follow up on missing or overdue items.		
11. SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE			
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STATE OF CALIFORNIA STATE COASTAL CONSERVANCY

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