

ESSENTIAL FUNCTIONS DUTY STATEMENTHRM-025

Classification Title: Analyst III	Branch/Division/Bureau: Office of the Special Counsel
Working Title: Intergovernmental Coordination Analyst	Office/Unit/Section/Geographic Location: Office of the Special Counsel/Sacramento (300)
Position Number (13 Digit): 413-117-5402-001	Conflict of Interest Position: ☒ YES ☐ NO
Employee Name:	Effective Date:

BASIC FUNCTION:

Under the general direction of the Supervisor II, the Analyst III performs advanced journey level analytical work for the Office of the Special Counsel (OSC). The incumbent conducts specialized, high value analytical assignments supporting the Department's participation in the National Association of Insurance Commissioners (NAIC) and the International Association of Insurance Supervisors (IAIS), Commissioner initiatives, and other OSC priorities. Responsibilities include coordinating multi step projects, conducting complex research and evaluations, preparing high level analytical materials, managing NAIC grant fiscal activities, and supporting intergovernmental and departmental collaboration. The Analyst III coordinates the work of other analytical staff on projects without formal supervisory authority, ensuring timely completion of assigned tasks and alignment with policy, regulatory, and operational requirements.

This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Statement of Economic Interest (Form 700), which includes an Assuming Office filing within 30 days of appointment, annual filings, and a Leaving Office filing within 30 days of physical separation. Non-compliance with the Conflict of Interest Code requirements may result in the voiding of appointment, financial penalties, or enforcement actions.

ESSENTIAL FUNCTIONS*

- 35% Plans, organizes, and coordinates complex, department wide analytical projects related to NAIC and IAIS activities. Conducts advanced analysis of regulatory issues, surveys, data calls, and training needs associated with national and international insurance regulatory work. Serves as a key analytical resource for OSC and departmental collaboration, ensuring projects are executed according to timelines and established procedures.
- 25% Manages fiscal administration of NAIC grant funds, including annual budget analysis, reconciliation, expenditure tracking, and compliance with funding and reporting requirements. Evaluates fiscal and administrative processes and recommends improvements to promote operational efficiency. Coordinates project timelines and deliverables and facilitates internal meetings to support project completion. Ensures compliance with mandated reporting

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requirements and supports responsible utilization of resources.

- 20% Develops, maintains, and reviews comprehensive reports, studies, and briefing materials to support OSC recommendations and strategic planning. Conducts analytical studies, surveys, and evaluations to assess program needs, identify operational alternatives, and inform department wide standards and procedures. Evaluates the effectiveness of established processes or compliance mechanisms and recommends adjustments to improve program outcomes and operational efficiency.
- 15% Coordinates with internal and external stakeholders to meet project, program, and organizational objectives. Facilitates collaborative discussions involving NAIC, IAIS, other regulatory partners, and intergovernmental entities. Records, organizes, and analyzes stakeholder input received during meetings, hearings, and collaborative engagements; synthesizes insights into policy recommendations or operational alternatives for executive decision making. Communicates sensitive or complex topics effectively to departmental leadership to support informed policy and program decisions.

MARGINAL FUNCTIONS

- 5% Collaborates with internal staff to resolve operational or program challenges and provides analytical support on sensitive or complex issues. Facilitates meetings, supports maintenance of tracking and monitoring systems, and assists with administrative or operational tasks requiring cross functional coordination.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- The incumbent may telework in accordance with CDIs telework policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed, however other authorized transit subsidies do exist for those who qualify.
- The incumbent must be able to work in a high-rise building.
- Must be able to move up to 10 pounds during travel if necessary.

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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

Printed Name

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

Printed Name