

☐ Current ☒ Proposed

Classification Title Analyst III (5402)	Division/Unit Administrative Services Division Human Resources Office
Working Title Performance Management Consultant	HQ Designation CalHR Sacramento
Position Number 363-100-5402-900	Date Prepared September 16, 2026
Name	Effective Date

CalHR Mission, Vision, and Values

The California Department of Human Resources (CalHR) is responsible for issues related to employee salaries and benefits, job classifications, civil rights, training, exams, recruitment and retention. For most employees, many of these matters are determined through the collective bargaining process managed by CalHR.

Our Mission: To serve as the trusted advisor to our strategic partners and the public, providing exceptional human resource services and guidance in developing a diverse and inclusive workforce.

Our Vision: Shaping California's future of public service excellence with fair and equitable employment opportunities and a diverse, engaged workforce.

CalHR Core Values: People Centric, Leadership, Accountability, DEIA, Integrity, and Transparency.

General Statement

Under the general direction of the Chief People Officer, Manager II, the Analyst III serves as the department's Performance Management Consultant. The incumbent independently performs the more complex and sensitive analytical and consultative work necessary to administer the Performance Management Program for CalHR and contracted client agencies. The incumbent analyzes performance, conduct, attendance, probationary, and disciplinary matters; interprets and applies laws, rules, regulations, collective bargaining provisions, statewide policy, and department procedures; develops options and recommendations for management consideration; and coordinates complex actions with the Legal Division and other subject matter experts.

The Analyst III exercises a high degree of initiative and independent judgment, manages multiple assignments with competing deadlines, and communicates recommendations to supervisors, managers, and executives. The incumbent does not supervise staff or exercise final managerial authority. Decisions reserved to management, including whether to initiate or approve corrective or disciplinary action, remain with the appropriate manager or appointing authority.

The incumbent promotes accurate, timely, equitable, and customer-centered service; maintains strict confidentiality; identifies risks and compliance concerns; and recommends practical

improvements that align Performance Management activities with CalHR's mission, values, and operational priorities.

Duties include, but are not limited to, the following:

Job Functions

[Essential (E) / Marginal (M) Functions] conducted [Onsite (O) / Virtually (V)]:

Percentage	(O) / (V)	Essential Job Duties
30%	O/V	Complex Performance Management Consultation Independently researches, analyzes, and advises supervisors, managers, and executives on complex and sensitive performance, conduct, attendance, behavioral, and misconduct matters for CalHR and contracted client agencies. Interprets and applies applicable Government Code provisions, regulations, collective bargaining agreements, statewide policies, department procedures, and relevant principles and practices to the facts of each matter. Evaluates documentation, identifies procedural or evidentiary gaps, assesses risk, develops alternatives, and recommends appropriate preventive, corrective, or disciplinary processes for management consideration in consultation with the Legal Division. Provides early-intervention guidance, including expectations memoranda, counseling, documentation strategies, performance improvement plans, leave and attendance coordination, and other measures intended to correct concerns at the lowest appropriate level. Coordinates complex cases involving multiple stakeholders and overlapping issues; establishes work plans and timelines; monitors required actions; documents consultations; and elevates significant risk, policy, or consistency concerns to the Chief People Officer. Facilitates difficult discussions and supports informal dispute-resolution efforts while maintaining neutrality, confidentiality, and appropriate role boundaries. Builds productive working relationships with internal and external partners and provides recommendations grounded in complete and objective analysis.
25%	O/V	Corrective and Disciplinary Action Analysis and Preparation Analyzes case facts and supporting documentation and prepares clear, accurate, and legally sufficient draft corrective and disciplinary documents for management and Legal Division review. Drafts or assists with notices of adverse action, rejection during probation, absence without leave, administrative time off, counseling memoranda, and related correspondence. Organizes exhibits and supporting evidence; prepares chronologies and issue summaries; and verifies that required notices, approvals, and procedural steps are addressed. Coordinates with management and the Legal Division to revise draft actions, resolve evidentiary or procedural concerns, and support timely service. Identifies and assists in securing appropriate Skelly and Coleman officers when required.

		Conducts or coordinates focused administrative fact-finding as assigned. Develops interview questions, reviews records, evaluates conflicting information, documents relevant facts, and prepares objective analytical summaries and conclusions for management consideration.
20%	O/V	Probationary Reports and Performance Appraisal Program Administers and coordinates the department's probationary report and annual performance appraisal processes. Develops schedules and communications, maintains tracking and reporting tools, monitors completion, follows up on overdue documents, and elevates unresolved compliance concerns. Provides technical guidance to supervisors and managers regarding probationary periods, performance standards, evaluation methods, Individual Development Plans, and the preparation of timely, specific, and supportable probationary reports and annual appraisals. Reviews reports and appraisals for completeness, consistency, appropriate supporting documentation, and compliance with applicable requirements. Identifies concerns and recommends revisions or corrective steps while supporting fair and equitable employment practices. Conducts internal compliance reviews, analyzes completion data and recurring issues, prepares management reports, and recommends process or training improvements. Coordinates responses and corrective action plans related to State Personnel Board compliance reviews and maintains documentation demonstrating corrective action and sustained compliance.
10%	O/V	Policy Procedure and Program Improvement Researches and analyzes new or amended laws, regulations, collective bargaining provisions, control-agency guidance, and statewide policies affecting performance management. Evaluates operational impact and prepares written analyses and recommended implementation strategies for the Chief People Officer. Develops and updates procedures, desk manuals, job guides, templates, tracking tools, and other resources to promote consistent, efficient, and compliant practices across CalHR and contracted client agencies. Analyzes program data, case trends, audit results, customer feedback, and workflow challenges to identify risk and improvement opportunities. Develops alternatives, assesses operational impacts, and recommends or implements approved process improvements. Serves as a program resource on cross-functional projects and coordinates with Legal, Labor Relations, Return-to-Work, Transactions, Classification and Hiring, and other partners when performance matters intersect with related personnel programs.
5%	O/V	Performance Management Training Designs, develops, delivers, and evaluates formal and informal training for supervisors and managers on performance

		management, documentation, probationary evaluations, progressive discipline, early intervention, and related topics. Assesses training needs using case trends, audit findings, surveys, course evaluations, and stakeholder feedback. Updates curriculum and resources to reflect current requirements and communicates complex information clearly to audiences with varying levels of experience.
5%	O/V	Action Service and Case Coordination Coordinates and, when necessary, personally completes timely and legally sufficient service of corrective or disciplinary documents on CalHR or contracted client agency employees. Confirms service requirements, arranges courier support when appropriate, preserves proof of service, and maintains the confidentiality and integrity of case materials.
Percentage	(O) / (V)	Marginal Job Duties
5%	O/V	Professional Development and Other Related Duties Performs other duties consistent with the Analyst III classification and department operational needs. Represents HRO at statewide meetings, forums, and workgroups related to performance management and progressive discipline; shares relevant information and recommended follow-up with HRO leadership and stakeholders. Participates in activities that support continued professional growth, program continuity, and knowledge transfer.

Supervision Received

The Analyst III reports to and receives the majority of assignments from the Chief People Officer, Manager II. Assignments may also be received from the Administrative Services Division Chief and Chief Deputy Director. The incumbent works under general direction and is expected to independently plan and organize work, determine analytical methods, consult appropriate resources, and complete assignments within established objectives and timeframes. The supervisor is informed of significant risks, sensitive matters, and issues requiring management decisions.

Supervision Exercised

None.

Special Requirements/Desirable Qualifications

This position has a Conflict-of-Interest designation and requires disclosure of economic interests on Form 700. The incumbent must demonstrate professional and ethical conduct consistent with CalHR's mission, vision, and core values and must protect confidential and sensitive personnel information. Desirable qualifications include:

- Knowledge of and experience applying human resources laws, rules, regulations, collective bargaining provisions, policies, and practices related to performance management and progressive discipline.
- Demonstrated ability to independently research and analyze complex issues, distinguish facts from assumptions, evaluate alternatives and risk, and prepare well-supported recommendations.
- Ability to gain the confidence of supervisors, managers, executives, and professional partners while providing objective and sometimes difficult advice.

- Strong written and verbal communication skills, including experience preparing sensitive personnel documents, analytical summaries, procedures, guidance, and training materials.
- Ability to manage multiple complex assignments, establish priorities, meet time-sensitive deadlines, and maintain accurate case documentation with limited oversight.
- Sound judgment, discretion, emotional intelligence, and the ability to maintain confidentiality and remain impartial in sensitive or contentious matters.
- Ability to collaborate across organizational boundaries, facilitate productive discussions, and build effective relationships with internal and external stakeholders.
- Experience identifying operational risks and leading or supporting process improvements, compliance activities, audits, or organizational change.

Working Conditions

The duties of this position are performed indoors at the 1515 “S” Street building. The employees’ workstation is equipped with standard or ergonomic office equipment, as appropriate.

To promote collaboration, team cohesion, and employee development, CalHR operates on a hybrid schedule in accordance with both Statewide and CalHR’s Telework Policies.

Attendance

Employees must maintain regular and acceptable attendance, as determined solely by the Department. They must be regularly available on-site or virtually and willing to work the hours deemed necessary or desirable to meet the Department’s business needs.

Employee Acknowledgement

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation (RA). * (If you believe an RA 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 RA Coordinator.)

*An RA is any modification or adjustment made to a job, work environment, or employment practice or process that enables an individual with a disability or medical condition to perform the essential functions of their job or to enjoy an equal employment opportunity.

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

Employee Signature	Employee Name	Date

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	Supervisor Name	Date