

**Department of Health Care Access and Information
Duty Statement**

Employee Name Vacant	Organization Office of Health Care Affordability (OHCA) Health Care Spending Targets Branch Research and Analysis Group 
Position Number 441-603-5770-XXX	Telework Option Hybrid
Classification Research Data Specialist III	Working Title Senior Health Policy Researcher
Supervision Exercised N/A	Location Los Angeles
Conflict of Interest: Yes ☐ No ☒	Fingerprint/Live Scan: Yes ☐ No ☒
Revision Date 7/21/26	Effective Date

Mission and Vision

HCAI is a leader in collecting data and disseminating information about California's healthcare landscape, promoting an equitably distributed health workforce, and publishing valuable information. The Department does this through five program areas - Affordability, Workforce, Data, Facilities, Financing.

HCAI's mission is to expand access to quality, equitable, affordable health care for all Californians by supporting high value delivery systems, resilient health facilities and workforces, and actionable health information and strategies.

HCAI's vision is a healthier California where all receive equitable, affordable, and quality health care.

General Description

Under the general direction of the Research Scientist Supervisor I, the Senior Health Policy Researcher independently carries out the most complex research and data analysis projects related to material change transactions, health care market investigations, and other related topics. Implements and coordinates major complex research projects related to analyzing and reporting on market consolidation, market power, and market failures in the health care market. Defines the scope of research criteria for projects; develops novel methods for collecting, analyzing and reporting data and serves as the department's top expert in the subject area.

Essential Job Functions

40% Health Care Market Analysis and Investigation

Leads the production of the most complex economic analyses to support OHCA's Cost and Market Impact Review (CMIR) program, which analyzes transactions that are likely to significantly impact market competition, the state's ability to meet spending targets, or

Department of Health Care Access and Information Duty Statement

affordability for consumers and purchasers. Research and analysis include assessing the impact of consolidation, market power, and market failures on competition, prices, access, quality, and equity in health care, as well as the increasing role of non-health care entities, such as private equity groups and hedge funds. Reviews key aspects of health care entities' market position or power, specialties, referral patterns and patient flows, and geographic service areas. Conducts research and analysis activities necessary for OHCA to develop recommendations regarding the competitive impact of transactions in the health care market. Conducts public facing research on the health care market to influence public policy and inform the public. Analyzes and acts as subject matter expert for data on economic, quality, and equity indicators, including use of Healthcare Payments Data (HPD), Patient Discharge Data (PDD), Hospital Annual Financial Disclosure Reports among other administrative datasets. Coordinates with OHCA leadership, and other HCAI staff to communicate recommendations to the Health Care Affordability Board (HCAB) for discussion and/or approval.

30% Evaluation and Reporting

Serves in a lead capacity to develop analyses and recommendations regarding the impact of health care transactions and market consolidation on the availability, accessibility, and cost of health care services and is widely recognized as a subject matter expert on health care topics. Develops reports analyzing the impacts of material change transactions on the cost, quality, and accessibility of health care services in a relevant market. Leads data collection, analysis, and reporting related to assessing health care market consolidation. Leverages research methods to prepare analytical products for internal and external reporting. Collaborates with OHCA Compliance attorneys to support data and policy analysis and provide recommendations regarding CMIRs and investigations. Reviews public as well as confidential and sensitive company information to analyze acquisitions and divestments, calculate concentration, and assess market consolidation. Synthesizes qualitative and quantitative findings for public and internal reporting, ensuring that analytical products and data and policy recommendations are accurate, complete, relevant, and adhere to internal quality assurance processes. Uses HCAI data assets to contribute highly technical research, data analyses and evaluations on effects of consolidation, health care spending, cost drivers, equity, primary care and behavioral health, efforts to improve affordability and other related health care topics. Provides statistical expertise in the analysis of survey, health care claims, and administrative data to ensure valid inferences are made.

20% Policy Research and Recommendations

Assumes an independent and lead role to develop strategies and methodologies to analyze material change transactions and health care markets. Critically assesses academic research and grey literature and evaluates policies and market trends inside and outside of California in order to develop options and recommendations in memoranda, reports, briefs, and presentations for Executive staff. Serves in a lead role in coordinating with OHCA Compliance attorneys on policy and program recommendations. Provides expert consultative services in the evaluation of critical and sensitive health care policy issues. Provides statistical expertise in the analysis of survey, health care claims, and administrative data to ensure valid inferences are made. Works with stakeholders on a

**Department of Health Care Access and Information
Duty Statement**

variety of issues, including state and national experts, sibling departments, health care entities, and consumer advocates.

Marginal Job Functions

5% Miscellaneous

Serves in a lead capacity with internal and external stakeholders; facilitates meetings, prepares meeting materials, documents program results, prepares and regularly update associated program plans, goals, objectives, and implement changes needed to achieve program objectives. Coordinates with other HCAI divisions on business use case proposals, data authorization requests and general data access needs for the office. Travels offsite for meetings or conferences. Supports and reviews the work of more junior team members or interns.

5% Other Functions

Performs other related duties as required.

Physical Demands

Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation.

Working Conditions

Requires in-person and remote meetings; prolonged sitting, reading, review, analysis and preparation of digital correspondence and documents; extensive use of phone and computer devices including Microsoft Office 365 productivity applications; frequent contact and communication with management, staff, consultants and the public; ability to get along with a diverse group of people and help maintain morale within the department; may be called upon to work for periods exceeding the normal workday or work week.

Employee Statement

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of this duty statement.

Employee Name	Employee Signature	Date Signed

Supervisor Statement

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Name	Supervisor Signature	Date Signed

**Department of Health Care Access and Information
Duty Statement**

Employee Name Vacant	Organization Office of Health Care Affordability (OHCA) Health Care Spending Targets Branch Research and Analysis Group 
Position Number 441-603-5758-XXX	Telework Option Hybrid
Classification Research Data Specialist II	Working Title Health Policy Researcher
Supervision Exercised N/A	Location Los Angeles
Conflict of Interest: Yes ☐ No ☒	Fingerprint/Live Scan: Yes ☐ No ☒
Revision Date 7/21/26	Effective Date

Mission and Vision

HCAI is a leader in collecting data and disseminating information about California's healthcare landscape, promoting an equitably distributed health workforce, and publishing valuable information. The Department does this through five program areas - Affordability, Workforce, Data, Facilities, Financing.

HCAI's mission is to expand access to quality, equitable, affordable health care for all Californians by supporting high value delivery systems, resilient health facilities and workforces, and actionable health information and strategies.

HCAI's vision is a healthier California where all receive equitable, affordable, and quality health care.

General Description

Under the general direction of the Research Scientist Supervisor I, the Health Policy Researcher independently carries out complex research and data analysis projects related to material change transactions, health care market investigations, and other related topics. Implements major complex research projects related to analyzing and reporting on market consolidation, market power, and market failures in the health care market.

Essential Job Functions

30% Health Care Market Analysis and Investigation

Assists the production of economic analyses to support OHCA's Cost and Market Impact Review (CMIR) program, which analyzes transactions that are likely to significantly impact market competition, the state's ability to meet spending targets, or affordability for

Department of Health Care Access and Information Duty Statement

consumers and purchasers. Research and analysis include assessing the impact of consolidation, market power, and market failures on competition, prices, access, quality, and equity in health care, as well as the increasing role of non-health care entities, such as private equity groups and hedge funds. Reviews key aspects of health care entities' market position or power, specialties, referral patterns and patient flows, and geographic service areas. Conducts research and analysis activities necessary for OHCA to develop recommendations regarding the competitive impact of transactions in the health care market. Conducts public facing research on the health care market to influence public policy and inform the public. Analyzes data on economic, quality, and equity indicators, including use of Healthcare Payments Data (HPD), Patient Discharge Data (PDD), Hospital Annual Financial Disclosure Reports among other administrative datasets. Coordinates with OHCA leadership, and other HCAI staff to communicate recommendations to the Health Care Affordability Board (HCAB) for discussion and/or approval.

30% Evaluation and Reporting

Assists in developing analyses and recommendations regarding the impact of health care transactions and market consolidation on the availability, accessibility, and cost of health care services. Develop reports analyzing the impacts of material change transactions on the cost, quality, and accessibility of health care services in a relevant market. Performs data collection, analysis, and reporting related to assessing health care market consolidation. Leverages research methods to prepare analytical products for internal and external reporting. Collaborates with OHCA Compliance attorneys to support data and policy analysis and provide recommendations regarding CMIRs and investigations. Reviews public as well as confidential and sensitive company information to analyze acquisitions and divestments, calculate concentration, and assess market consolidation. Synthesizes qualitative and quantitative findings for public and internal reporting, ensuring that analytical products and data and policy recommendations are accurate, complete, relevant, and adhere to internal quality assurance processes. Uses HCAI data assets to contribute highly technical research, data analyses, and evaluations on effects of consolidation, health care spending, cost drivers, equity, primary care, behavioral health care, efforts to improve affordability, and other related health care topics. Provides statistical expertise in the analysis of survey, health care claims, and administrative data to ensure valid inferences are made.

30% Policy Research and Recommendations

Assists in developing strategies and methodologies to analyze material change transactions and health care markets. Critically assesses academic research and grey literature and evaluates policies and market trends inside and outside of California in order to develop options and recommendations in memos, reports, briefs, and presentations for Executive staff. Coordinates with OHCA Compliance attorneys on policy and program recommendations. Provides consultative services in the evaluation of critical and sensitive health care policy issues. Works with stakeholders on a variety of issues, including state and national experts, sibling departments, health care entities, and consumer advocates.

**Department of Health Care Access and Information
Duty Statement**

Marginal Job Functions

5% Miscellaneous

Assists in facilitating meetings, preparing meeting materials, documenting program results, preparing and regularly updating associated program plans, goals, objectives, and implementing changes needed to achieve program objectives. Travels offsite for meetings or conferences. Supports and reviews the work of more junior team members or interns.

5% Other Functions

Perform other related duties as required.

Physical Demands

Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation.

Working Conditions

Requires in-person and remote meetings; prolonged sitting, reading, review, analysis and preparation of digital correspondence and documents; extensive use of phone and computer devices including Microsoft Office 365 productivity applications; frequent contact and communication with management, staff, consultants and the public; ability to get along with a diverse group of people and help maintain morale within the department; may be called upon to work for periods exceeding the normal workday or work week.

Employee Statement

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of this duty statement.

Employee Name	Employee Signature	Date Signed

Supervisor Statement

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Name	Supervisor Signature	Date Signed