

PROPOSED

RPA NUMBER (HR USE ONLY)

26-050

ALERT: This form is mandatory for all Requests for Personnel Action (RPA).

INSTRUCTIONS: Before completing this form, read the instructions located on last page.

Section A: Position Profile

A. DATE	B. APPOINTMENT EFFECTIVE DATE	C. INCUMBENT NAME VACANT
D. CIVIL SERVICE CLASSIFICATION Analyst III		E. POSITION WORKING TITLE Special Projects and Investigations Analyst
F. CURRENT POSITION NUMBER 695-244-1303-005		G. PROPOSED POSITION NUMBER (Last three (3) digits assigned by HR) 695-244-5402-XXX
H. OFFICE / SECTION / UNIT / PHYSICAL LOCATION OF POSITION Administrative Services/Human Resources		I. SUPERVISOR NAME AND CLASSIFICATION Jeffrey Jacobstein, Chief of Human Resources
J. WORK DAYS / WORK HOURS / WORK SHIFT (DAY, SWING, GRAVE) MONDAY-FRIDAY / 8AM-5PM / RANCHO		K. POSITION REQUIRES: FINGERPRINT BACKGROUND CHECK ☒ YES ☐ NO DRIVING AN AUTOMOBILE ☐ YES ☐ NO

Section B: Position Functions and Duties

Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).

	Information Technology Domains (Select all domains applicable to the incumbent's duties/tasks.) ☐ Business Technology Management ☐ IT Project Management ☐ Client Services ☐ Information Security Engineering ☐ Software Engineering ☐ System Engineering
	Organizational Setting and Major Functions Under the general direction of the Chief of Human Resources, the Analyst III serves as a senior-level Human Resources (HR) consultant and performs the most complex, sensitive, and high-impact analytical assignments affecting multiple HR programs and department-wide workforce initiatives. The incumbent is responsible for leading major special projects; evaluating complex or HR issues; developing policy, program, and process recommendations; and advising HR leadership and departmental management on matters with significant operational, employee-relations, compliance, or organizational impact. The Analyst III also conducts administrative workplace investigations, including matters involving managers, executives, multiple complainants or respondents, conflicting evidence, significant organizational risk, or allegations requiring extensive credibility analysis and coordination with Labor Relations, Legal, Equal Employment Opportunity, and executive leadership. The incumbent determines investigative strategy and scope, evaluates evidence, reaches well-supported findings, and identifies systemic concerns. The position requires a very high degree of independence, judgment, discretion, analytical expertise, and confidentiality.
% of time performing duties 40%	Essential Functions (Percentages shall be in increments of 5, and should be no less than 5%.) HR Special Projects and Program Development - Lead the most complex, sensitive, and high-impact HR special projects and department-wide initiatives that cross multiple HR disciplines and may involve novel issues, competing priorities, with significant organizational implications. Projects may include those similar to the following: - Activities associated with the California State Payroll System (CSPS) project. - Implementation of CalHR's recommended accelerated hiring process. - Expanding the use of PeopleSoft related to our hiring and onboarding processes. - Implementation of AI into HR business processes. - Implementation of Microsoft products to improve productivity and automate standardized processes. - Serve as the senior analytical resource on assigned initiatives; define project scope and objectives, identify stakeholders, establish methodologies and work plans, evaluate risks and dependencies, and drive projects from concept through implementation and evaluation. - Analyze complex operational, policy, workforce, and organizational issues; evaluate alternatives and downstream impacts; and develop defensible recommendations for HR leadership and departmental management.

30%

- Develop and present executive-level briefings, decision documents, analytical reports, implementation strategies, policies, procedures, and other products that translate complex findings into actionable recommendations.
- Facilitate cross-functional workgroups and help resolve issues requiring coordination among HR subject matter experts, program leadership, control agencies, Legal, Labor Relations, and other stakeholders.

Workplace Investigations

- Plan and conduct administrative workplace investigations, including allegations involving managers or executives, multiple parties, serious misconduct, policy violations, or other matters.
- Conduct intake and preliminary assessment of complaints; identify allegations and applicable policies; determine investigative scope, issues, witnesses, evidence needs, and investigative strategy.
- Independently interview complainants, respondents, witnesses, managers, and executive-level employees; formulate probing and follow-up questions; assess credibility; reconcile conflicting testimony; and gather, preserve, and analyze documentary and electronic evidence.
- Prepare comprehensive investigative reports that clearly document allegations, evidence, credibility assessments, analysis, findings, and supporting rationale that can withstand review by HR leadership, Legal, Labor Relations, executive management, or other appropriate entities.
- Exercise independent judgment in identifying when consultation with Labor Relations, Legal, Equal Employment Opportunity, or executive leadership is necessary while maintaining the independence, integrity, and confidentiality of individuals and the investigative process.
- Identify patterns, systemic concerns, control weaknesses, or organizational risks revealed through investigations and recommend policy, training, process, or management improvements to reduce recurrence.

20%

HR Policy Writing and Legislative Analysis

- Conduct the most complex research and analysis of HR policies, procedures, and business processes to identify areas of operational improvement and risk factors in existing HR policies.
- Develop or substantially revise HR policies, procedures, desk manuals, templates, controls, tracking mechanisms, and governance tools for department-wide use.
- Interpret and apply laws, rules, regulations, bargaining unit provisions, State personnel policies, control-agency guidance, and relevant best practices to complex or unusual HR issues; identify areas of risk or ambiguity and recommend courses of action.
- Monitor, research, and analyze pending state and/or federal legislation, regulations, and budget proposals relevant to human resources and department's programs; assess potential impacts and prepare written analyses, position recommendations, and briefing materials for management and executive staff.

10%

Marginal Functions

- Represent HR on high-level meetings, workgroups, and committees and independently respond to urgent or emerging assignments requiring advanced research, analysis, judgment, and discretion.
- Maintain complete and confidential project and investigative records, metrics, decision documentation, and other information necessary to support accountability and defensible HR decisions.
- Scan, copy, file, and retrieve records; maintain electronic and hard-copy files in accordance with established procedures.
- Act as a backup to answer and route incoming calls and emails and respond to routine inquiries or direct customers to the appropriate HR staff member.
- Perform other routine office support duties necessary to support the efficient operation of Human Resources.

Work Environment Requirements

- The work environment often operates at a fast pace where demands require managing multiple high priorities simultaneously, each with tight deadlines.

- Work is performed in a standard office environment with controlled lighting and temperature and requires prolonged periods of computer use and participation in meetings.
- May be required to work outside of normal work schedule.
- Travel may be required in the Sacramento area for meetings and/or training.

Allocation Factors (Complete each of the following factors.)

Supervision Received:

The Analyst III works under general direction and receives assignments in terms of broad objectives, expected outcomes, and priorities. The incumbent independently determines the appropriate analytical or investigative approach, methods, resources, and sequencing of work. Completed work and recommendations are generally reviewed for overall effectiveness, soundness of judgment, policy implications, and achievement of objectives rather than for methodology or detailed process.

Actions and Consequences:

The incumbent makes independent judgments and recommendations on highly sensitive HR matters, workplace investigations, policies, and department-wide initiatives. Errors in analysis, investigative findings, interpretation, or recommendations could result in inappropriate personnel actions, employee-relations disputes, legal or compliance exposure, inconsistent application of policy, loss of confidence in HR processes, or significant operational and reputational impacts to the department.

Personal Contacts:

The incumbent has frequent contact with HR leadership and staff, executives, managers, supervisors, employees, complainants, respondents, witnesses, Labor Relations, Legal, Equal Employment Opportunity, control agencies, and other departmental stakeholders. Contacts involve obtaining sensitive information, conducting interviews, resolving complex issues, presenting findings and recommendations, influencing decisions, and coordinating implementation of department-wide initiatives.

Administrative and Supervisory Responsibilities:

None. The position may lead projects, investigations, workgroups, or cross-functional teams and provide technical direction or guidance to other staff but does not have formal supervisory responsibility.

Supervision Exercised:

None. May function as a project lead or subject matter expert and provide technical guidance, mentoring, or coordination to analysts and other staff on assigned projects and investigations.

Other Information

Desirable Qualifications: (List in order of importance.)

- Demonstrated experience independently conducting complex and sensitive workplace investigations and preparing well-supported investigative reports.
- Advanced analytical, research, interviewing, writing, and critical-thinking skills, including the ability to assess credibility and reconcile conflicting evidence.
- Extensive knowledge of California State HR laws, rules, policies, bargaining unit provisions, and personnel practices.
- Experience leading complex cross-functional projects and developing executive-level recommendations, policies, or process improvements.
- Ability to exercise exceptional judgment, discretion, neutrality, and confidentiality when handling sensitive employee and organizational matters.
- Strong consultation, facilitation, and communication skills, including experience working effectively with executives, managers, Legal, Labor Relations, and other stakeholders.

INCUMBENT STATEMENT: I have discussed the duties of this position with my supervisor and have received a copy of the duty statement.

INCUMBENT NAME (PRINT)

INCUMBENT SIGNATURE

DATE

SUPERVISOR STATEMENT: I have discussed the duties of this position with the incumbent.		
SUPERVISOR NAME (PRINT)	SUPERVISOR SIGNATURE	DATE