Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Analyst II	Workforce Operations Analyst
NAME OF INCUMBENT:	POSITION NUMBER:
	280-227-5393
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Workforce Operations Unit	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Command Center, ARU 227	Supervisor I
BRANCH:	REVISION DATE:
Disability Insurance	1/29/2026

Duties Based on: ☒ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours

2. REQUIREMENTS OF POSITION

Check all that apply:

☐ Conflict of Interest Filing (Form 700) Required
☒ May be Required to Work in Multiple Locations
☐ Requires DMV Pull Notice
☒ Travel May be Required
☐ Call Center/Counter Environment
☒ Requires Fingerprinting & Background Check
☐ Bilingual Fluency *(specify below in Description)*
☐ Other *(specify below in Description)*

Description of Position Requirements:
(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

5% to 10% travel may be required within California

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:
(Briefly describe the position's organizational setting and major functions)

The Disability Insurance (DI) Branch's Workforce Operations Unit is responsible for the real-time monitoring of the DI branch resources and workloads and investigates non-adherence challenges for the Workforce Management (WFM), IntegratedI Contact Center (ICC) and other identified systems, and develops recommendations to provide to the DI Branch management.

Under the direction of the Supervisor I, the Analyst II independently performs complex and sensitive tasks to plan, organize, and complete workload-related activities for the WFM and the ICC systems, and activities for the DI Branch. The incumbent performs the more difficult and complex analyses for the DI Command Center Division and is responsible for a full range of business process and project management activities.

The incumbent works closely with staff and management across the DI Branch to ensure schedules, strategy and burndown workloads are performed to achieve the established Service Level Agreements (SLA). The incumbent must have the ability to work in a fast-paced environment and possess strong communication skills (written and verbal) as they will be responsible for providing time-sensitive information to stakeholders across the DI Branch; and the implementation of workload and program-related initiatives. The incumbent

maintains knowledge of the business environment, systems, and external factors/trends related to staffing allocations, resource planning, and workload needs. The incumbent performs complex research and analysis, acts a Subject Matter Expert (SME), and participates and facilitates branch-wide work groups and projects.

Candidate must have advanced level knowledge of Microsoft Excel.

Percentage of Duties	Essential Functions
40%	Provides consultation, research, and analyses on the most complex business and workload efforts for the DI Branch. Monitors overall branch workload (call and claim) volumes and monitors and/or investigate scheduling challenges (WFM, ICC, SDI, KMS, IHUB etc.), develops recommendations and provides to management utilizing various Information Exchange (IEX) WFM tools. Performs planning, monitors workload inventories, and Service Level Agreements (SLAs) to ensure optimal workload management practices are achieved. Independently develops workload initiatives and strategies, acts as a lead for the execution of workload management activities and initiatives; ensures developed plans are executed and achieved. Analyzes branch performance and works collaboratively to make strategic, real-time staffing and routing recommendations to management, while ensuring forecasted service level goals are met. Researches, gathers, and analyzes data related to workload inventories and SLAs to ensure workload volumes are addressed in a timely manner; presents collected information for an audience to understand. Ensures business objectives are clearly understood by all DI divisions, utilizes effective communication to convey time-sensitive information. Works directly with team members and management to ensure staff and resources are appropriately allocated and workload inventories are optimized. Serves as a point of contact for operations managers regarding same-day schedule updates and revises workforce management computer system accordingly. Communicates with DI leadership on real-time strategic staffing and workload recommendations and continues to follow-up until resolved.
30%	Independently evaluates productivity across the DI Branch in order to ensure timeliness, volume, and quality of workload activities and initiatives. Provides timely updates to the unit Supervisor I and team members by evaluating performance and overall progress in achieving administrative goals and objectives based upon established workload management policies and practices. Leads and facilitates the development of workload management plans and strategies on a short-term, long-term, and ad-hoc basis. Coordinates activities with other divisions to communicate a uniform application of workload management policies and procedures. Develops, maintains, analyzes, and distributes statistical daily, weekly, monthly and ad-hoc reports outlining branch productivity. Prepares ad hoc reports or statistics.
20%	Employs business process re-engineering methodologies into WFM strategies in order to streamline efficiencies in the workflow process. Leads and facilitates project-related activities and work groups. Acts as the primary contact on projects and implementation of new procedures and tools. Facilitates meetings with DI Branch representative and project teams. Provides lead consultation and impact analysis relative to DI systems, processes, and policies.
5%	Cross-trains on all analytical WFM functions within the Command Center.
Percentage of Duties	**Marginal Functions**

5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

Standing: Occasionally - activity occurs < 33%	Sitting: Frequently - activity occurs 33% to 66%
Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Occasionally - activity occurs < 33%
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%

Other: *Click here to enter text.*

Type of Environment:
☒ High Rise ☒ Cubicle ☐ Warehouse ☐ Outdoors ☐ Other:

Interaction with Customers:
☐ Required to work in the lobby
☐ Required to work at a public counter
☒ Required to assist customers on the phone
☒ Required to assist customers in person
☐ Other:

5. SUPERVISION EXERCISED:
(List total per each classification of staff)

N/A

6. SIGNATURES

Employee's Statement:
I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.

Employee's Name:

Employee's Signature: Date:

Supervisor's Statement:
I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.

Supervisor's Name:

Supervisor's Signature: Date:

7. HRSD USE ONLY

Classification and Pay Group (CPG) Approval

☒ Duties meet class specification and allocation guidelines.	CPG Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	AF	10/14/2026

Reasonable Accommodation Unit use ONLY *(completed after appointment, if needed)*

If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation (DE 8421) form and submit to Human Resource Services Division (HRSD), Reasonable Accommodation Coordinator.

List any Reasonable Accommodations made:

Civil Service Classification	Position Number
Analyst II	280-227-5393

Supervisor: After signatures are obtained, make 2 copies:

- Send a copy to HRSD (via your Attendance Clerk) to file in the employee's Official Personnel File (OPF)
- Provide a copy to the employee
- File original in the supervisor's drop file

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POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Analyst I	Workforce Operations Analyst
NAME OF INCUMBENT:	POSITION NUMBER:
	280-227-5157
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Workforce Operations Unit	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Command Center, ARU 227	Supervisor I
BRANCH:	REVISION DATE:
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Summary Statement:
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Under the supervision of the Supervisor I, the Analyst I works collaboratively with a team to complete workload-related activities for the WFM and the ICC systems, and scheduling activities for the DI Branch. The incumbent performs less complex and routine analyses for the DI Command Center Division and is responsible for a full range of business process and project management activities.

The incumbent works closely with staff and management across the DI Branch to ensure workloads are performed to achieve the established Service Level Agreements (SLA). The incumbent must have the ability to work in a fast-paced environment and possess strong communication skills (written and verbal) as they will be responsible for providing time-sensitive information to stakeholders across the DI Branch; and the implementation of workload and program-related initiatives. The incumbent maintains knowledge of the

business environment, systems, and external factors/trends related to staffing allocations, resource planning, and workload needs. The incumbent performs research and analysis, acts as a Subject Matter Expert (SME), and participates and facilitates branch-wide work groups and projects.

Candidate must have intermediate level knowledge of Microsoft Excel.

Percentage of Duties	Essential Functions
40%	Provides consultation, research, and analyses on the less complex business, scheduling, and workload efforts for the DI Branch. Monitors overall branch workload (call and claim) volumes and monitors and/or investigate challenges (WFM, ICC, SDI, KMS, IHUB etc.), develops recommendations and provides to management utilizing various Information Exchange (IEX) WFM tools. Assists the lead analyst on workload planning, monitors workload inventories, and Service Level Agreements (SLAs) to ensure optimal workload management practices are achieved. Develops workload initiatives and strategies and assists with the execution of workload management activities and initiatives; ensures developed plans are executed and achieved. Analyzes branch performance and works collaboratively to make strategic, real-time staffing and routing recommendations to management, while ensuring forecasted service level goals are met. Researches, gathers, and analyzes data related to workload inventories and SLAs to ensure workload volumes are addressed in a timely manner; presents collected information for an audience to understand. Ensures business objectives are clearly understood by all DI divisions, utilizes effective communication to convey time-sensitive information. Works with team members and management to ensure staff and resources are appropriately allocated and workload inventories are optimized. Serves as a point of contact for operations managers regarding same-day schedule updates and revises workforce management computer system accordingly. Communicates with DI leadership on real-time strategic staffing and workload recommendations and continues to follow-up until resolved.
30%	Evaluates productivity across the DI Branch in order to ensure timeliness, volume, and quality of workload activities and initiatives. Provides timely updates to the unit Supervisor I and team members by evaluating performance and overall progress in achieving administrative goals and objectives based upon established workload management policies and practices. Participates in the development of workload management plans and strategies on a short-term, long-term, and ad-hoc basis. Coordinates activities with other divisions to communicate a uniform application of workload management policies and procedures. Develops, maintains, analyzes, and distributes statistical daily, weekly, monthly and ad-hoc reports outlining branch productivity. Prepares ad hoc reports or statistics.
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