LWDA
LABOR & WORKFORCE DEVELOPMENT AGENCY

☐ Current
☒ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Analyst II	*Fiscal Policy and Administration Analyst*
NAME OF INCUMBENT:	POSITION NUMBER:
Vacant	397-100-5393-705
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Fiscal Policy & Administration	Jonathan Zeigler
DIVISION:	SUPERVISOR'S CLASSIFICATION:
N/A	Supervisor I
BRANCH:	REVISION DATE:
N/A	11/10/2026

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.)

3. DUTIES AND RESPONSIBILITIES OF POSITION

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

Under the direction of the Labor and Workforce Development Agency's (LWDA) Supervisor I, the Analyst II (Analyst) performs a variety of more complex analytical, administrative, and program management duties in support of LWDA's operational and strategic objectives. The incumbent independently conducts research, analyzes data, develops recommendations, and coordinates the implementation of Agency initiatives and projects.

The incumbent is responsible for performing more complex analytical assignments involving budget-related activities, program planning and evaluation, policy and procedure development, and the analysis and implementation of Agency initiatives.

The Analyst supports the Deputy Secretary of Fiscal Policy and Administration with budget development and serves as lead analyst for Department of Finance (DOF) budget drills, exercises, and reporting. The Analyst independently researches, drafts, and maintains policy memos, procedures, and guides for management review and approval. The Analyst independently facilitates the Exempt Position Request (EPR) process, working with LWDA's departments and the Governor's Office to onboard appointees. The incumbent analyzes, routes, and provides recommendations on Secretary's Action Requests (SARs), including but not

limited to grant proposals, regulatory proposals, legislatively mandated reports, procedure change requests, and more.

The Analyst assists in the construction of the technical budget for LWDA and assists with the development of LWDA budget change proposals. The Analyst uses a variety of tools and knowledge to perform general fiscal computations and analyses, including personnel costs, operating expenditure reports, and more. The Analyst supports Agency leadership by reviewing and making recommendations on more complex administrative proposals including but not limited to contracts, grant funding requests, Out-of-State Travel requests, the Record Retention Schedule, and more.

Percentage of Duties	Essential Functions
35%	**Fiscal Policy and Programs**: The Analyst assists in the construction of the budget for the Office of the Secretary and performs primary fiscal exercises. The incumbent: • Assists executive leadership with the development of LWDA budget change proposals, independently reviews more complex departmental budget change proposals, and provides technical assistance to LWDA departments on Agency budget submissions as assigned. Independently analyzes and makes recommendations on a variety of more complex budget-related projects. • Assists executive leadership with the development, preparation, monitoring, and analysis of more complex agency budgets, expenditure plans, and fiscal projections. • Independently reviews and analyzes more complex budget documents, expenditure reports, funding allocations, and fiscal data to identify trends, discrepancies, and potential funding issues. • Serves as a lead by operating as LWDA's primary designated FI$Cal user and point of contact, utilizing FI$Cal to run budget drills and provide other fiscal reports, and coordinating with the DOF on system updates and trainings. • Independently runs and analyzes a variety of more complex budget drills, including developing and analyzing personnel costs and operating expenditures estimates, and is responsible for assisting in the construction of all fiscal packages that are required by DOF. • Independently analyzes, reviews, and makes recommendations on grant funding programs, federal funding opportunities, contracts, and the fiscal impacts of departmental information technology projects. • Utilizes a variety of tools to execute duties and is responsible for taking initiative to independently develop and maintain desk manuals and guides, documents, reports, spreadsheets, tracking mechanisms, and more.
25%	**Agency Initiatives and Project Implementation**: The Analyst independently analyzes and determines implementation requirements, identifies risks and alternatives, and recommends approaches or strategies for more complex and sensitive Agency initiatives, internal projects, and operational improvements; independently develops implementation plans, project schedules, tracking tools, and status reports to monitor progress and ensure timely completion of deliverables; and proactively collaborates with management and program staff to identify implementation requirements, establish priorities, and address operational challenges. For each assigned initiative, the Analyst establishes benchmarks and metrics, identifies risks and challenges that could affect delivery, and develops mitigation strategies and contingency plans to keep projects on schedule. The incumbent serves in a lead capacity to independently develop and disseminate guidance, procedures, communications, and training materials to support the successful implementation of new initiatives. Following implementation, the Analyst proactively and independently evaluates

	the effectiveness of initiatives and recommends adjustments to improve operational efficiency and program outcomes. Initiatives may include developing and implementing Agency-specific processes and procedures, coordinating implementation of Agency's policies, supporting implementation of the Strategic Plan, and assisting with end-of-administration transition planning. Independently analyzes project requirements, identifies operational needs, develops implementation plans and procedures, establishes timelines, tracks deliverables, and coordinates input and feedback from stakeholders, including executive leadership and employee organizations, as appropriate. Serves as the project lead for assigned initiatives by coordinating the work of other analysts and support staff, providing project guidance, monitoring progress, and reviewing work products for accuracy, completeness, and consistency with established objectives and requirements. Proactively identifies potential issues, evaluates alternatives, and develops recommendations to support effective project implementation.
20%	**Project and Administrative Support**: The Analyst is responsible for proactively and independently analyzing current programs, policies, and procedures, and making recommendations on implementation to ensure consistency with LWDA's strategic initiatives and State requirements. The incumbent independently develops templates, letters, memos, reports, spreadsheets, tracking mechanisms, manuals and guides, and other documents, as needed to support LWDA operations. In support of LWDA Executives and subordinate departments, the Analyst independently conducts research and supports the planning, execution, monitoring, and closure of projects and programs related to the Governor's initiatives and the work of the Agency's departments, boards, and panels, while adhering to established methodologies and best practices. The incumbent coordinates with cross-functional teams within Agency as well as with the Governor's Office and LWDA's departments through meetings, training sessions, workshops, and conferences. The Analyst is responsible for independently developing and delivering training to Agency and department staff on applicable programs, policies, procedures, and operational processes. The incumbent utilizes analytical skills to independently gather, interpret, and present data related to project progress, key performance indicators, and potential areas of improvement, creating a detailed understanding of the programs and projects under the purview of the LWDA and the departments, boards, and panels within LWDA. The Analyst also independently researches more complex legislation, analyzes its fiscal and operational impact on LWDA initiatives, and drafts recommended responses for management.
15%	**General Administration Programs**: The Analyst proactively and independently researches, formulates, and maintains LWDA policies and procedures and provides technical administrative support to LWDA employees on policy and program issues. The incumbent independently analyzes and reviews a variety of more complex administrative documents for compliance with State and Agency requirements and recommends approval, revision, or denial. These include, but are not limited to, contracts, purchase orders, invoices, out-of-state travel requests, the Record Retention Schedule, human resources documents and more. The incumbent also assists executive leadership with the analysis of Secretary's Action Requests (SARs) including regulatory packages, grant proposals, legislatively mandated reports, and more. In addition, the Analyst assists in the coordination of LWDA administrative matters to ensure continuity of LWDA operations. This work requires independently interpreting and applying the State Contracting Manual, the State Administrative Manual, and CalHR and Agency policies, reconciling requirements across departments, and resolving issues before items reach executive review. The Analyst also supports LWDA committees, commissions, and panels on administrative matters and independently facilitates intra-agency communication on priority administrative issues. Policies and procedures maintained in this function may include the Record Retention Schedule and Agency procedures for out-of-state travel, contracting and procurement, and Secretary's Action Requests.
Percentage of Duties	**Marginal Functions**

5%	Performs other duties as assigned.

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

Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 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)

None. May serve as a project or task lead; does not provide direct supervision.

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

Personnel Management Group (PMG) Approval

☒ Duties meet class specification and allocation guidelines.	CPU Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	HV	11/16/2026

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	397-100-5393-705

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