State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Claims Legal Chief Counsel, Strategy

Program:
Claims Legal Department

Work Unit:
Administration

Classification:
Career Executive Assignment, Range C

Report To:
Chief Claims Operations Officer

Collective Bargaining Identifier (CBID):
M01

Fair Labor Standards Act (FLSA) Status:
Not Covered, Exempt. Work Week Group E

Special Requirements

Conflict of Interest Designation: Yes
This position is designated under the State Fund Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter.

Program Information:

Our statewide Claims Legal team works closely with our Claims Adjusting Team to deliver superior outcomes for injured employees and the employers we serve by paying what we owe, defending what we don't and doing it with a great sense of urgency. We aim to attract and retain a highly engaged, high performing Legal team.

Purpose/Scope:

Under the general direction of the Chief Claims Operations Officer, the Claims Legal Chief Counsel, Strategy is part of State Fund's senior leadership team and provides leadership and direction for the long-term strategic development and advancement of the Claims Legal function. The incumbent partners closely with the Claims Legal Chief Counsel, Operations to align future-state strategies, legal policies, modernization efforts, and enterprise priorities with operational needs, capabilities, and service-delivery objectives.

The Claims Legal Chief Counsel, Strategy is accountable for enterprise Claims Legal strategy, policy development, modernization, innovation, legal technology, data analytics, and the design of future-state legal practices. The incumbent evaluates legislative, regulatory, judicial, industry, technological, and organizational developments and translates them into statewide strategies, policies, standards, governance frameworks, and implementation plans that strengthen legal services and organizational performance.

Through ongoing collaboration with the Claims Legal Chief Counsel, Operations, Claims leadership, technology

partners, and other enterprise stakeholders, the incumbent sponsors strategic initiatives, establishes outcome and benefit measures, advises senior leaders, and facilitates the consistent adoption of new policies, practices, and solutions across Claims Legal. The position ensures that strategic investments and organizational changes support effective legal operations, enhance the defense of State Fund, and protect State Fund's long-term interests.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

30% Essential

1. Lead Claims Legal modernization, legal technology, and data analytics strategy statewide. Assess business needs and emerging capabilities; develop business cases, roadmaps, governance models, performance measures, and implementation plans for technology-enabled legal services. Develop, approve, implement, and periodically update policies and standards governing legal technology, responsible use of automation and artificial intelligence, data quality, reporting, access, privacy, records, vendor solutions, and system adoption. Sponsor pilots and enterprise deployments; monitor benefits, risks, controls, user adoption, and results; and direct corrective action to ensure solutions improve quality, timeliness, consistency, and value.

30% Essential

2. Direct enterprise legal strategy, policy development, and future-state planning for Claims Legal. Evaluate legislative, regulatory, judicial, industry, and operational trends and determine their implications for State Fund. Formulate and implement statewide legal policies, procedures, practice standards, decision frameworks, and strategic plans in coordination with the Chief Counsel (Operations) and business partners. Establish policy development and approval processes, assign implementation ownership, communicate requirements, provide interpretation and guidance, and measure compliance and effectiveness. Recommend revisions when laws, risks, business objectives, or performance results change.

20% Essential

3. Sponsor and govern the Claims Legal strategic initiative portfolio, including innovation, continuous improvement, service design, and cross-enterprise transformation projects. Define priorities, scope, outcomes, resources, milestones, risk controls, and success measures; prepare budget and investment recommendations; and report progress to senior leadership. Develop and implement portfolio management, project governance, change management, and benefit-realization policies. Use operational data, stakeholder

feedback, benchmarking, and quality results to identify opportunities, scale successful practices, and ensure that strategic changes are sustained.

20% Essential

4. Provide strategic legal counsel and policy leadership to the Chief Claims Operations Officer, Claims Executive Vice Presidents, Executive Vice President of Corporate Claims, Executive Committee, and other State Fund leaders. Advise on emerging laws, enterprise risks, litigation strategy, innovation, and long-range business implications. Represent Claims Legal on senior leadership and enterprise committees and with external workers' compensation stakeholders. Lead executive communication, stakeholder alignment, and organizational change for new strategies and policies. Direct leadership development and succession planning for assigned staff and ensure leaders are equipped to implement strategic policies consistently statewide.

100%

Required Knowledge Areas:

- Proficient knowledge of workers' compensation laws, regulations, trends, practices, and the California Labor Code.
- Working knowledge of the organization, mission and statutory environment of the State Fund in order to function effectively in a policy-influencing assignment.
- Working knowledge of legal operations and department management.
- Working knowledge of legal technology and data analytics.
- Working knowledge of executive communication and stakeholder alignment.
- Working knowledge of coaching, mentoring, and supervision best practice.
- Working knowledge of talent management and succession planning.
- Demonstrated experience practicing California workers’ compensation law, including providing strategic legal counsel, managing complex litigation, and advising executive leadership within a workers’ compensation insurance organization.

Required Skills and Abilities:

- Ability to align with and promote the vision, mission and values of the State Fund. A key element of this mission is to provide employees with an opportunity for professional growth and satisfaction. Knowledge of and experience in the principles and practices of effective corporate legal practices, including broad experience in insurance law.
- Ability to interact in a positive and professional manner and to develop and maintain strong working relationships with co-workers, management and other employees.
- Ability to plan, direct, coordinate and review the work of a program consisting of professional legal staff and other civil service employees.
- Ability to promote and encourage a success-oriented, accountable work environment with an emphasis on customer service.

- Ability to prepare an annual operating budget and in planning, developing, implementing, and evaluating a program to achieve corporate and program objectives through effective use of available resources.
- Ability to apply the highest legal and ethical standards in all areas of responsibility, including the creation and maintenance of a safe workplace, maintaining the assets of the State Fund, and application of the laws, rules and guidelines of civil service and Equal Opportunity in management and employment.
- Ability to make speeches, deliver training, draft or edit reports, memos, correspondence, analyses and to articulate concepts and ideas in a clear and concise manner.
- Excellent written and oral communication skills.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects and telephone work; mobility to various working areas.
- Incumbent works in the usual office environment.

Travel:

- Travel to various work sites and locations for training and/or meetings.
- Travel may occasionally be from overnight to five days in duration.

Emergency call backs:

- Not applicable.

Work Hours:

- Work beyond regularly scheduled hours may be necessary.

Supervisor's Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):

Supervisor Signature & Date:

Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):

Employee Signature & Date: