



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
7/22/2026

This position is:

- ☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt. Svc – Supervisory
☐ Mgmt. Svc – Managerial
☐ Mgmt. Svc - Confidential

Agency: Department of Consumer & Business Services

Facility: Labor & Industries Building

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Operations and Policy Analyst 3</u>	b. Classification No: <u>C0872</u>
	<u>0003.281 /</u>
c. Working Title: <u>Data Analyst</u>	d. PPDB No/WD ID: <u>000000141659</u>
e. Section Title: <u>DFR – IPRC – Property and Casualty</u>	f. Agency No: <u>44000</u>
g. Employee Name: <u>Vacant</u>	h. Budget Auth No: <u>1403992</u>
i. Supervisor Name: <u>Keith Turner</u>	j. Repr. Code: <u>OAS</u>
k. Work Location (City – County): <u>Salem – Marion</u>	

I. Position:	☒ Permanent	☐ Seasonal	☐ Limited Duration	☐ Academic Year
	☒ Full-Time	☐ Part-Time	☐ Intermittent	☐ Job Share
m. FLSA:	☐ Exempt	If Exempt:	☐ Executive/Supervisory	n. Eligible for Overtime: ☒ Yes
	☒ Non-Exempt		☐ Administrative	☐ No
			☐ Professional	
			☐ Computer	

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Department of Consumer and Business Services (DCBS) is Oregon's largest business regulatory and consumer protection agency. The department administers state laws and rules to protect consumers and workers in the areas of workers' compensation, occupational safety and health, financial services, insurance and building codes.

DCBS consists of the Workers' Compensation Division; Oregon Occupational Safety and Health Division; Division of Financial Regulation; Building Codes Division; Small Business Ombudsman; and Ombudsman for Oregon Workers. The department provides shared services to all divisions through the Director's Office and Central Services Division. The department also provides shared services to the Workers' Compensation Board. DCBS employs 950 employees and has a biennial operating budget of approximately \$685 million.

The Division of Financial Regulation’s mission supports that of the department by protecting Oregonians’ access to fair products and services through education, regulation, and consumer assistance. The division is responsible for ensuring the safety and soundness of financial institutions, the availability and affordability of financial products, and the fair treatment of consumers. Functions include licensing, regulating, and monitoring the conduct of banks, credit unions, financial services providers, health care service contractors, insurance companies, and licensed or registered agents of such entities.

The Data Team is focused on protecting consumers from past, ongoing or future harm by regulated entities’ non-compliance with laws and rules. This team conducts industry data calls, requests for information and analysis of reported data from regulated entities.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

The Data Analyst serves as a technical resource for the Division of Financial Regulation for internal procedures and working with outside entities. Conducts comprehensive studies of insurance and financial industry data, systems, processes, and business requirements to evaluate, identify and recommend process improvements that effectively reduce costs, ensure compliance, improve service delivery, and to help better understand the entities regulated by the division.

Manage and examine report filings, ensuring timely and complete filing of all companies, validating information, and work with companies to help gain compliance with state and federal laws and use of reporting systems.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.			
Ongoing			- Perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully. Engage in effective team participation through willingness to assist and support co-workers, supervisors, and other work-related associations. Develop good working relationships with division and agency staff and supervisors through active participation in accomplishing group projects and in identifying and resolving problems in a constructive manner. Demonstrate openness of constructive feedback and suggestions, in an effort to strengthen work performance. Contribute to a positive, respectful and productive work atmosphere. - Foster and promote the importance and value of a diverse, discrimination and harassment free workplace. Respect diversity of opinions, ideas, and cultural differences. Support outreach and diversity related efforts in order to diversify the workforce. - Regular attendance is an essential function required to meet the demands of this job and to provide necessary services.
35%	N	E	Develop and maintain a solid understanding of the business processes related to market conditions and how those processes relate to the business reporting applications. Liaise with the Information Technology & Research (IT&R) team to communicate business needs and support the development, testing and implementation of new or enhanced business

			systems for the division. Query various state and federal databases and utilize collected information to support business needs. Support the division and agency direction by interpreting data and provide analytical expertise to retrieve answers for complex questions. Conduct comprehensive studies to determine and manage reporting requirements from regulated entities in order help identify areas of non-compliance that is not readily available. Develop procedures for modifying reporting systems, instructions for end-users to provide information, and manage the implementation and data collection. Interact with DFR managers and staff to understand how the business areas function to accomplish their purpose or mission, what products or services are provided to both internal and external customers and how delivery is accomplished, the business processes, goals and objectives, how the units interact within and outside of the organization, and the current state of the organization. Manage and communicate requirements which may include obtaining and maintaining consensus among key stakeholders, creating and maintaining documentation, and developing and giving presentations. Develop or assist business partners with conducting feasibility studies, requests for proposal, legislative and fiscal impacts, or budget development documents.
20%	N	E	System Support Maintain expert level understanding of data and functionality of DFR data systems. Analyze, diagnose, and respond in a timely manner to data system issues, data system performance problems, data integrity/accuracy problems, and production job issues. Identify and create appropriate business rules. Coordinate fixes for data system issues and work with IT business partners in developing resolution and prevention of future issues. Answer questions about data, system functionality, system processes, and production jobs, such as comprehensive data calls as ordered by the Insurance Commissioner. Coordinate the completion of data system support activities. Write queries to provide ad-hoc data to agency business partners. Create and maintain system use documentation. Identify and recommend to IT partners opportunities for data system or business process improvements. Identify actual business needs (beyond expressed desires), problems, and opportunities and define solutions to meet those needs. Analyze and prioritize requirements in order to define the required capabilities of a potential solution that will fulfill and/or improve division needs. Assess and validate solutions with IT&R to ensure they meet the business need and facilitate their successful implementation. Prepare business cases

			and other project documentation as appropriate. Assist agency business partners with developing business processes to ensure data system reliability and data quality.
20%	N	E	Data Analysis Support business and policy decisions through the use of data mining and analytics, identifying and resolving complex issues through the reconciliation of large data sets, and presenting results to all levels of management. Monitor performance statistics and compliance of data. Serve as a subject matter expert on data analytics and regulatory reporting for the division and its functional areas, including, but not limited to, files processing, reconciliation, regulatory reporting, encounter data, and data calls ordered by the Insurance Commissioner. Collaborate with leaders in various internal program areas and external parties to ensure timely and accurate data. Collaborate with various sections and program areas to identify and resolve complex issues and errors that involve internal and external systems, data, and regulatory guidance; lead and execute complex data-related analytical projects to drive business decisions and efficiencies; ensure timely and accurate reporting, correction of issues and errors, identify and implement best practices, support audits and attestations. Prepare analysis to identify trends and issues, troubleshoot errors and propose methods for resolution, validate data against other data sources, requirements and/or technical specifications, and work with data exchange processes and workflows between the state, federal government entities, and stakeholders subject to regulation by DFR to ensure accurate and complete data. Develop and implement data analytics, reconciliation, and reporting policies and procedures. Maintain up-to-date knowledge of regulatory requirements and industry best practices as it relates to data. Attend training sessions and other appropriate industry meetings.
20%	N	E	Systems Analysis & Design Analyze and design business processes and workflow that will accommodate new or enhanced system changes. Analyze and design data system components (logical databases, screens, business rules and data edits, batch programs, reports, other output and how they will interface with each other. Analyze and design data conversion strategies that will allow accurate, secure, and efficient transfer of information between the old system and the new or enhanced systems. Perform logical data modeling, document and store documentation according to systems analysis and design specifications according to IT&R Application Development standards and processes. Validate accuracy of analysis and design with users; review and test programmed data system components for accuracy and quality; and assist with functionality and usability testing by end users. Develop comprehensible user training documentation and prepare training

			material to help end users change to the new or enhanced systems. May provide training, coaching, and mentoring to agency staff in support of project management best practices and standards and processes. Participate in technical and procedural problem solving with IT&R systems support team; document solutions, as appropriate. Understand, apply, and contribute to DCBS Application Development architecture, standards and processes for implementing data systems.
5%	N	NE	Other duties as assigned. Write and maintain desk operating procedures.
Ongoing	N	E	<u>Data Stewardship</u> Per IRM-07, has the responsibility and accountability for a set of business information. This includes: Controlling access to the data, ensuring those who do have access can get what they need when they need it, and ensuring the data is accurate and kept up to date. As a Data Steward responsible for both the managerial and operational roles, has the responsibility and authority to approve and signoff on IMD Service Requests, Risk Assessments, and System Access Requests. Ensures that data entry staff are trained and have desk manuals, and that data quality processes and appropriate internal controls are in place. Proposes and implements processes to ensure data quality and internal controls, assesses the quality of data, resolves data issues, maintains business rule and data definition information, and coordinates changes to the meaning of data. Understands and follows DCBS policies related to data stewardship, especially IRM-04 and IRM-07. Has a basic understanding of the Data Stewardship References listed under Section 5 Guidelines below.
100%			

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Open office work environment with factors that include noise, overhead lighting, and temperature variations during weather transitions. Must be able to handle a variety of interruptions and have the ability to perform varied tasks throughout the workday. Long periods using the computer. This position is eligible for hybrid remote work. The employee is responsible for travel to and from the Salem office and will not be compensated for commuting.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- Oregon Revised Statutes 743, 743B, 731
- Oregon Administrative Rules 836-053
- Various desk manuals

- NAIC internet site
- IRM Policies
- Records Retention
- Information Technology & Research (IT&R) Systems Development Life Cycle

b. How are these guidelines used?

To ensure regulated entities' compliance with the reporting requirements and learn new subject matters. The IT&R System Development Life Cycle instructs the employee on the standards, procedures, and guidelines they must use when designing computer software for DCBS.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			
DFR Staff	In-person, email, phone	Day to day activities	Daily
Oregon Health Insurance Marketplace	In-person, email, phone	Provide information both proactively and in response to inquiries	Daily/Weekly depending on current projects
Information Technology & Research	In-person, email, phone	Collaborate on DFR technical needs	Daily/Weekly depending on current projects
Directors Office	In-person, email, phone	Apprise of reports and assist Communications when inquiries are received. Provide information both proactively and in response to inquiries.	As needed
NAIC	In-person, email, phone	Request report enhancements. Provide feedback on NAIC managed projects related to i-Site and SBS.	As needed
Insurance Companies and third Party Administrators	In-person, email, phone	Resolve compliance, data, and reporting issues. Request or provide information.	Daily
Other organizations involved in the financial industry	In-person, email, phone	Respond to inquiries	As needed
Other State agencies	In-person, email, phone	Respond to inquiries	As needed

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position conducts analysis to determine the compliance status of regulated entities. Analysis of the condition of insurance institutions affects the level of formal supervision required.

This position must apply critical thinking and critical thinking and analysis to data requested and supplied by regulated entities. The affect of these decisions and judgments can lead to the need for further investigation and / or appropriateness of courses of actions required of respondents.

In collaboration with the DFR leadership team, this position will help determine the priority of data projects specific to the division's needs. Upon presentation to and acceptance by leadership of identified major projects associated with the division's business systems improvement projects, this position has the authority to carry out and oversee IT projects for the division, including the need to interpret or implement

management policies and/or operating practices. The work affects the business operations to a substantial degree. This position will serve as a project consultant and provide expert advice to DFR leadership, contributing to the long- and short-term business objectives.

Decides how best to respond to and resolve issues with data systems. If poor decisions are made, data could be corrupted resulting in incorrect information being used by end users or the general public, system functionality, response time, and availability may be negatively affected resulting in decreased productivity of many end users or the general public.

Decides how best to elicit accurate business requirements from DFR staff based on the knowledge and style of the persons involved. If poor decisions are made, specifications may be incorrect resulting in work products delivered that may not meet the actual needs of the customer or achieve the project objectives.

Decides how best to design new or enhancements to existing data system components or interfaces based on business requirements and IT&R screen and database design standards. If poor decisions are made, projects could be delayed, delivered software may not function properly or efficiently, delivered software may not meet the customer needs, and software may not be easily maintained.

Based upon expertise and thorough and comprehensive study, this position, in collaboration with IT business partners, makes effective recommendations on best IT solutions for DFR business systems. This position determines the breadth and scope of projects with recommendations normally accepted without significant change. Impact studies can involve the primary systems of other divisions within the agency, such as the Health Insurance Marketplace, Central Services Division, and Oregon Health Authority.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".				
Compliance and Regulatory Manager 2	0001.085	Informal and formal meetings	As needed and during the quarterly review	Technical review of most of the work products through formal meetings and performance review occurs for achievement of overall objectives

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? _____
How many employees are supervised through a subordinate supervisor? _____
- b. Which of the following activities does this position do?
- | | |
|--|---|
| ☐ Plan work | ☐ Coordinates schedules |
| ☐ Assigns work | ☐ Hires and discharges |
| ☐ Approves work | ☐ Recommends hiring |
| ☐ Responds to grievances | ☐ Gives input for performance evaluations |
| ☐ Disciplines and rewards | ☐ Prepares & signs performance evaluations |

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

Per ORS 731.228 no Division employee shall be a director, officer, or employee of or be financially interested in any person regulated by the insurance code, except as a policyholder or claimant under an insurance policy or by rights vested in commission, fees, or retirement benefits prior to being employed with the division.

Special Requirements:

Position is subject to a criminal background check.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
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Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority Signature

Date