



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
04/15/2024

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: Project Manager 3
b. Classification No: C0856
c. Working Title: Project Manager
d. PPDB No/WD ID: 8100507
e. Section Title: DFR - Policy - DCBS
f. Agency No: 44000
g. Employee Name:
h. Budget Auth No: 680420
i. Supervisor Name: Jesse O'Brien
j. Repr. Code: MMN
k. Work Location (City – County): Salem – Marion

I. Position: Permanent Seasonal Limited Duration Academic Year
Full-Time Part-Time Intermittent Job Share

m. FLSA: Exempt Non-Exempt
If Exempt: Executive/Supervisory Administrative Professional Computer
n. Eligible for Overtime: Yes No

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 mission of the Department of Consumer and Business Services is 'To Protect and serve Oregon's consumers and workers while supporting a positive business climate in the state.' 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 Policy Section is charged with researching, analyzing, and developing public policy, as well as preparing technical analyses to explain recent trends, develop projections of future costs and market dynamics, and inform financial decisions regarding fiscal impacts of proposed legislation, rules, and advisory guidance across all the division's programs. This team is responsible for leading the division's legislative and rulemaking work, providing analysis to customers across the division, and informing the division's policy direction. The Policy team works closely with all teams in the division and is responsible for facilitating technical and policy advisory discussions with stakeholders.

The section conducts research that focuses on short- and long-term financial risks to consumers in the marketplace, utilizing data collection and analysis, and review of current policy and legal publications and sources that impact the division's authority to address issues in the market. The final product may take a range of forms, including but not limited to draft legislation, rulemaking, published guidance to stakeholders, internal memoranda, and informal guidance to stakeholders.

The section achieves its policy objectives by working closely with internal and external stakeholders, staying abreast of current trends in each market regulated by the division, and setting strategic priorities based upon the urgency and severity of a given issue to consumers and stakeholders.

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 project manager will work on complex problems to identify solutions, evaluate options, make recommendations to senior management, participate in decision making on ultimate solutions, and then oversee the implementation of the solution. While there are some recurring projects, most projects will vary over time. Projects likely will be high-risk and require working with federal, state or local agencies and various public and private interested parties. Project Manager is responsible for developing and managing the execution of complex project plans of various scope and size involving both internal and external interested parties. For example, projects could include coordinating and organizing the work the insurance commissioner and other staff conduct with their counterparts in other states and jurisdictions to collectively develop model laws, white papers, and other public policy affecting the insurance, banking, and other financial services industries across the country. The project manager may also be asked to coordinate the DCBS director's involvement in interagency initiatives, such as natural disaster response, the Oregon Seismic Safety Policy Advisory Commission, and the Sustainable Health Care Cost Growth Target Program. Must monitor project, budgets, schedules and controls from project initiation to project close out. This position will contribute to the DCBS decision-making process for the detailed requirements, design, testing, training, and start-up operations for the development and implementation efforts for achieving the long term goals of the agency. For example, projects could include partnering with other state agencies, legislators, and federal agencies to design, develop, and implement multi-million dollar programs impacting the entire commercial health insurance market in the state.

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
Ongoing			<ul style="list-style-type: none"> • 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.
50%	N	E	<p>Project Management Use project management standards, principles, and planned outcomes to manage projects. (Examples of projects listed below.) Initiate projects including obtaining authorization and commitments, demonstration of business need and project feasibility. Develop and manage master project plans that coordinate individual work tasks, schedules, preliminary project funding plans, and project budgets. Organize project teams according to project requirements. Assemble and lead groups to define project scope. Lead project teams to identify time frame, funding limitations, methods for accomplishing project deliverables, and allotments of available resources to project phases. Outcomes include assigned projects are completed within established timeframes and within budget when applicable. Ensure all impacted parties are included in the process and aware of expectations and impact.</p> <p>Identify specific tools or data sets needed by the project team, and plan to obtain needed resources at the proper project phase or step. Identification of proper tools and data sets will allow policy team members and senior staff to analyze data, public policy proposals, political environments, legal landscapes, and the several financial services markets that DFR regulates. Prepare project budgets that coordinate cost estimates, and summarize total expected costs. Develop methods to track project budget expenditures. Identifying needed resources will mitigate any delays in the project and budget estimates will be communicated to the budget analyst to determine if any budgetary concerns exist. Ongoing communication during the project with those impacted will allow time to resolve potential problems during the process.</p> <p>Create documentation procedures to capture and deal with changes in original project plan. Work with appropriate internal and external interested</p>

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

		<p>parties to develop contractor Statement of Work. Interested parties may include other staff throughout DCBS and other state agencies, legislators, industry representatives, and consumer advocates. Lead project team to produce a work breakdown structure that outlines the project plan; and assign duties, responsibilities and scope of authority to project team members. Develop and implement plans to communicate with and involve project interested parties. Identify project risks; identify which risks are likely to affect the project; and design strategies to manage and mitigate those risks. This is to ensure project is completed within required timeframes, or documents circumstances that required original timeframe to change</p> <p>Develop and maintain effective working relations with staff, other agencies, state, federal and national organizations, and interested parties with whom work must be coordinated or interfaced. Interested parties may include legislators, industry representatives, consumer advocacy organizations, think tanks, and members of the public. Organize and lead work projects related to national boards, committees, groups or taskforces related to the regulation of insurance or other financial institutions.</p> <p>Projects will vary with the needs of the division, with only occasional recurring projects such as rate review and leading the division's wildfire response annually. These projects require assembling appropriate teams, leading teams in efforts in a variety of areas with a multitude of internal and external interested parties. Lead and coordinate resolutions between parties with conflicting priorities that need to be reconciled to ensure successful completion of the project. The project is organized and planned before all information is available, requiring the ability to course correct throughout the ongoing project while still meeting set deadlines.</p> <p>Examples of projects include:</p> <ul style="list-style-type: none"> • Coordinating and managing the development and delivery of training to DFR staff and industry stakeholders of new regulatory requirements. • Coordinating and managing intergovernmental work, including management and presentation of data to legislators or other agencies, management of memoranda of understanding, coordinating with and supporting committees of the National Association of Insurance Commissioners. • Coordinating with other state and federal agencies in the design and implementation of major public health reforms such as the redesign of programs under the Affordable Care Act's State Innovation Waiver Program. • Coordinating emergency response to natural disasters and public health emergencies. • Coordinating data requests from industry and the All Payers All Claims Database under the Oregon Health Authority. • Coordinating highly complex and high risk media inquiries, litigation discovery, and public records requests involving highly sensitive information. • Coordinating the division's development of legislative concepts, which involves the solicitation of input from all sections of the division, the DCBS director, and the governor's office.
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			<ul style="list-style-type: none"> • Design, develop, and maintain communication channel between industry members developing innovative products and key policy staff and program managers to provide regulatory consultation. • Planning strategic planning and team building meetings. • Standing up new programs and managing recruitments.
30%	N	E	<p>Business Analysis Elicit requirements/needs using interviews, document analysis, requirements workshops, storyboards, site visits, business process descriptions, use cases, scenarios, event lists, task and workflow analysis and viewpoints. Assist customers to determine business/system requirements, focus on desired outcome, and outline possible alternatives to desired outcome. For example, one desired outcome would be that all DFR staff and industry members are adequately trained on new regulatory requirements through written guidance, job aids, and live trainings and question and answer sessions. Write business requirements specifications according to standard templates, using natural language simply, clearly, and concisely. Decompose high-level business requirements and quality, specified in appropriate level of detail. Lead requirements analysis and verification, ensuring that requirement statements are complete, consistent, concise, comprehensible, traceable, feasible, unambiguous and verifiable and that they conform to standards. Manage changes to baseline requirements through effective application of change control processes and tools. Requires working with both internal and external interested parties, including coordinating with other state agencies and national organizations. Examples of interested parties include the director’s office, governor’s office, the Racial Justice Council, the Insurance Advisory Committee, and the Oregon Legislature.</p> <p>Monitor, analyze, and make suggestions for improvements for team processes, such as tracking and assigning referrals from consumer advocacy, data analysis of consumer complaints. Manage and coordinate improvements to the team’s information technology and data tools. Monitor and analyze the team’s performance metrics. Develop, implement and maintain system for tracking major policy decisions and documents, including major sub-regulatory guidance documents, written DOJ guidance on policy issues, written internal policy guidance</p>
10%	N	E	<p>Contract Monitoring: Monitor and report out on contractor performance against the project plan. Coordinate Deliverable review groups to ensure timely and accurate review, approval and acceptance of sub-deliverables and deliverables. Review deliverables with specific responsibility for overall coherence of the final documents. Evaluate the quality of services provided through review of reports and/or statistical data; confer with reporting staff as needed. Ensure that project outcomes are consistent with agency strategic direction as well as supporting the tasks, activities and deliverables. Monitor progress on tasks and develop methods for working through project related issues. Provide coordination among contract, agency and other state and external staff; facilitate procedures of communication between contractors and interested parties to ensure full participation, cooperation and representation of all. Develop and maintain effective working relationships with all partners and personnel with who work much be coordinated or interfaced. Oversee/facilitate the resolution of business areas or cross-functional issues. Review and approve bills/invoices for payment.</p>

5%	N	E	<p>Scope Management and Planning Assist with development of contract amendments, change orders, and new procurements including the preparation of materials for submission to the federal government, state legislature, Department of Administrative Services and the Department of Justice.</p> <p>Facilitate/oversee the identification of change requests and ensure appropriate people are involved in the process and outcomes.</p> <p>Develop and enforce system development standards that are in compliance with the Guide to the Project Management Body of Knowledge (PMBOK), ISO 9001, and/or CoBit. Identify task resource requirements. Develop and Implement policy for change control procedures. Consults with programs in business process analysis.</p> <p>Responsible for the preparation of consultant contracts, personnel services contracts, and flexible service contracts.</p>
5%	NC	NE	Other duties as assigned
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. Position will interact with both division staff and the public. Travel out of state for conference attendance and travel to geographically dispersed program locations throughout the state may be required. Must have and maintain a valid driver's license and an acceptable driving record. Occasional evening and weekend work is normal for this position.

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.

- Federal Law
- Code of Federal Regulations (CFR's)
- Oregon Revised Statutes
- Oregon Administrative Rules
- Contract Law
- Legislative Direction
- IRMD Policies
- Collective Bargaining Agreements
- Department of Administrative Services Rules
- Department of Human Services policies, procedures, standards and methodologies
- Project Management Institute's Guide to the Project Management Book of Knowledge

b. How are these guidelines used?

To ensure the project outcomes meet program specifications, performance requirements and are consistent with State policy. To ensure State and Federal policies, laws and regulations are followed.

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?
Division and Department personnel	In person, in writing, by phone, by internet	To provide or obtain information	Daily
Administrator, Deputy Administrators, Division and DCBS Managers	Phone/in person	Discuss policy, procedures	Daily
Volunteers, Coordinators, Sponsor Directors	In person, in writing, by phone, by internet	Supervision, support, and education	Daily
Public including medical providers, insurers, employers, etc.	Phone/in person /correspondence	Obtain information, provide public information	Daily
Other state agencies, other jurisdictions, national organizations, NAIC, etc.	Phone/in person /correspondence	Obtain information, provide public information	Daily

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 7. POSITION RELATED DECISION MAKING

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

This position's responsibility involves the management and direction of multiple complex projects of various scope and size. Work involves the management of diverse interested party expectations and cross-functional project teams. Typical decisions made by this position include project scope, planned budget, tools and resources needed for a successful outcome.

Manages projects that include the implementation of new programs within the division.

Poor decision making, judgment, or communication can impact scope, quality, budget and timely delivery of the project and support to internal and external organizations/interested parties. Decisions may affect the ability of the Agency to meet Federal regulations and standards. Decisions that have a negative impact on the project could impact public perception of the agency, state government and services to organizations/citizens.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Compliance and Regulatory Manager 2	0002543	Daily consultation, observation, review of work and reports	Quarterly check-ins	Ensure active projects are progressing as scheduled and to follow-up on upcoming projects and discuss if

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

				additional resources may be required.
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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?

- | | |
|--|---|
| <input type="checkbox"/> Plan work | <input type="checkbox"/> Coordinates schedules |
| <input type="checkbox"/> Assigns work | <input type="checkbox"/> Hires and discharges |
| <input type="checkbox"/> Approves work | <input type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input type="checkbox"/> Gives input for performance evaluations |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> 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:

Very strong preference will be given to persons whose job experience and references reflect high performance in the areas of outstanding customer service, personal initiative, and communication skills and in developing and maintaining harmonious work relationships.

This position works collaboratively in a team setting. Good team player skills are necessary, including the willingness to collaborate, share information, and contribute to the team's success as necessary. The position also requires excellent customer service skills for both internal and external customers, and the ability to demonstrate initiative and independent judgment on an on-going basis. Contribute to a positive, respectful and productive work environment.

The position requires excellent oral and written communication and inter-personal skills, ability to work alone, as a team member and to be a strong self-starter. The person must have the ability to draft project timelines and work reports and to facilitate meetings and committees and work with people who have diverse interests. Policy development knowledge and the ability to understand and communicate how policy changes may affect the project timelines and initiatives is desirable.

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.

As an employee, you must comply with the Oregon government ethics laws, ORS 244.010 – 244.280, and DCBS Policy EMP-01, Ethics and Conflict of Interest.

This position is eligible for remote work part- or full-time, once the incumbent has gained the proficiency to perform work independently. The incumbent may occasionally be asked to work from the office on an as-needed basis.

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 cursor 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
<i>Mary Pence</i> _____ Appointing Authority Signature	7/12/2024 _____ Date		