



**STATE OF OREGON
POSITION DESCRIPTION**

Position Revised Date:
8/9/2021

This position is:

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

Agency: Oregon Real Estate Agency

Facility:

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: Operations & Policy Analyst 3	b. Classification No: C0872
c. Effective Date:	d. Position No:
e. Working Title: Licensing & Regulatory System Replacement Business Analyst & Project Manager	f. Agency No: 91900
g. Section Title: Commissioner's Office	h. Budget Auth No:
i. Employee Name: Vacant	j. Repr. Code: AR
k. Work Location (City – County): TBD	
l. Supervisor Name: Anna Higley	
m. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input checked="" type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	o. Eligible for Overtime: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Professional <input checked="" type="checkbox"/> Administrative	

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 Agency's mission is to provide quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market.

ORS 696.375(2) and .395, ORS 92, ORS 94, ORS 100, ORS 105. The Real Estate Agency is under the supervision and control of the Real Estate Commissioner. The Commissioner's Office acts as the division with responsibility for the Administration of the Agency, with responsibility for the performance of duties imposed upon the Agency.

The Agency stands alone. The Commissioner is appointed by and reports to the Governor. The Deputy Commissioner is appointed/supervised by the Commissioner as an Executive Service Operations Officer, leading the strategic plan and management team of the Agency, ensuring that the Agency carries out its mission.

STATUTORY RESPONSIBILITY

The multi-billion dollar real estate, property management, escrow, and land development industries make up more than 20% of Oregon's gross domestic product and are the focus point of the Real Estate Agency's activities. These industries involve the largest single investment most individuals make in their lifetime. It is necessary to continually balance the desires and needs of those regulated against the best interests of the citizens of Oregon, as they pertain to major and most serious business decisions.

Real Estate Activities – ORS 696, ORS 105 & OAR Chapter 863; Division 10

Statutory Finding (696.015) Licensed activity for consumers is a matter of public concern. The statute was enacted to create for the public a healthy real estate market atmosphere and to assure that professional real estate activity is conducted with high fiduciary standards. The Commissioner's office exercises discretion in establishing methods for examining, licensing, educating, disseminating information, regulating, investigating, auditing, enforcing, adjudicating, and sanctioning licensees.

Escrow Activities – ORS 696 & OAR Chapter 863; Division 50

Statutory finding (ORS 696.508) The Commissioner has authority to protect the public in escrow agents' handling of large sums of money (\$27-30 Billion annually) and important rights of clients. Improve standards of escrow conduct. The Commissioner's office exercises discretion in establishing methods for licensing, educating, disseminating information, regulating, investigating, auditing, enforcing, adjudicating, and sanctioning licensees.

Subdivisions and Series Partitions Activities – ORS 92 & OAR Chapter 86; Division 30

In establishing the statute the Legislature found a "need exists to protect the public from fraud, deceit and misrepresentation." The Commissioner exercises discretion in establishing methods for determining what is satisfactory information for administration and enforcement; establishes acceptable standards and conditions prerequisite to sales, adjudicates appropriate sanctions and civil penalties for violation and/or the need to pursue criminal prosecution.

Condominiums – ORS 100

The Commissioner's office must issue or approve the public reports which include a full and adequate disclosure to consumer of all pertinent factors. Decisions must be made when necessary to bring action in circuit court for unlawful activity.

Planned Communities; Timeshare Estates; Membership Campgrounds – ORS 94 & OAR Chapter 86, Division 30

The Commissioner's must draft and issue public reports under the Timeshare law and is charged with regulating through issuance of orders to desist and refrain, levying fines and bringing action in circuit court. Membership camping contracts must be reviewed, a certificate of registration issued, and salespeople registered, all of which must be satisfactory to the Commissioner.

STAFF

The Agency presently has approximately 29 full-time employees.

BUDGET

This is a dedicated fund Agency with \$9.8 million biennial budget. Through the required development, review process, and execution of the Agency's operating budget, the Commissioner must account to the Governor, the Legislature, the public served, and the regulated industries which pay the fees.

The Real Estate Agency is a stand alone Agency of which the Real Estate Commissioner's office, on a daily basis, is the final decision maker for the benefit of Oregon consumers in the following:

1. Interpreting the respective statutes and written rules;
2. Reviews contested case hearings conducted by the Office of Administrative Hearings and issues administrative orders based on those hearing as well as reviewing and approving stipulated settlements reach through the Agency's dispute resolution process and;
3. Determining effective methods of education and regulation for protecting Oregonians through applying statutory remedies and working with other law enforcement agencies;
4. Forecasting impacts on the Agency by an ever-changing real estate market and national economy;
5. Using discretion in deciding the most efficient use of limited fiscal and administrative resources to address fluctuating needs;
6. Determining appropriate policy direction for the Agency

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 primary purpose of this position is to coordinate effective business analysis, project management and implementation of the replacement of the Agency's core licensing and regulatory system. This system replacement involves multi-faceted, interrelated agency functions and includes license applications, land development filing, and case management modules for complaints, audits, investigations and violations. Various system modules will be used by agency staff, external partners and customers and the agency will be exploring different communication methods and capabilities such as application and SMS for mobile use. The replacement system will interface with external organizations, which will require data to be exported and imported, and will also include various customer portals. This position would coordinate aspects of the project to incorporate current and potential changes in policy, procedure and business processes for the agency, customers and partners, and plan for those changes accordingly. This role's successful execution of this project would improve systems and business operations which affect all aspects of core agency functions, ensure statutory requirements and obligations are met, improve data management, tracking and reporting, and increase efficiency and data for the agency, partners and customers.

At the direction of the Deputy Commissioner this position will resource and coordinate the project related activities of the line staff, subject matter experts, Agency management, external stakeholders and members of the public; leading the \$1-1.5 million information technology project.

Outcomes from this work affect significant impact on Agency operations, 30,000+ licensees and businesses, and Oregon consumers of real estate. The position also provides professional expertise to the Commissioner's office and Agency divisions, business programs and IT.

This position is responsible for representing the requirements of the Agency and confirming they are met. They are to serve as the key contact person and coordinator of business stakeholders for the Agency on the system replacement project.

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
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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".

Ongoing	N	E	<p>Work Expectations and Standards</p> <p>The person in this position must:</p> <p>Demonstrate ethical standards and independent judgment at all times.</p> <p>Treat customers in a responsible, reasonable, fair, impartial and positive manner. Provide prompt, correct, careful and sensible service. Show respect, empathy and common sense. Provide information in a consistent, reasonable manner with empathy and flexibility. Interactions with internal and external customers must also avoid an adversarial approach. Show initiative to offer assistance, offer an apology when appropriate, and use complaints as opportunities to improve the service of the organization.</p> <p>Work collaboratively in a team setting, work together, and openly share information leading to team success. The person in this position must contribute to a positive, respectful and productive work environment.</p> <p>Foster and promote the importance and value of a diverse workforce, free from discrimination and harassment. Solicit, respect, and value diversity of opinions, ideas, and cultural differences. Support outreach and diversity related efforts in order to diversify the workplace.</p> <p>Recognize the value of individual and cultural differences. Create a work environment where individuals' differences are valued. Consistently treat customers, stakeholders/partners, and co-workers with dignity and respect.</p>
70%	N	E	<p>Analysis, Coordination/Planning, Documentation/Communication, Definition, Program Support, and Production Support</p> <ul style="list-style-type: none"> • Analysis <ul style="list-style-type: none"> ○ Provide business knowledge policy and process expertise to ensure quality development and implementation of requirements, enhancement, and corrections. ○ Analyze the impact of change, correction, and enhancement with regard to Agency-wide and stakeholder facing implementation of replacement system and version upgrades. ○ After system implementation, complete review of all agency policies, plans and procedures, making adjustments and/or draft recommendations as necessary to incorporate system changes. • Coordination/Planning <ul style="list-style-type: none"> ○ Coordinate definition, configuration, development, testing, training, and release management activities for system and integrating systems internally and externally to Agency (OSP/FBI, Testing Vendor, Real Estate Associations, Education Providers, DOJ, SFMA) throughout the project or effort lifecycle. ○ Develop initial business plan, project plans and schedules, coordinate project phases, and adjust as needed. Track task completion estimates for invoices and identify and communicate barriers, working with the project sponsor, when appropriate. ○ Coordinate involvement of OREA SMEs as needed.

			<ul style="list-style-type: none"> ○ Identify, communicate and monitor interdependencies throughout each solution request. For example, determine if configuration decisions impact decisions for upstream or downstream processes and subsystems and determine how training and testing are impacted. • Documentation/Communication <ul style="list-style-type: none"> ○ Act as the primary communications contact between program coordinators; developers; managers; end users; and external partners.. ○ Create documentation including business case, business requirements, and functional requirements, by describing current and desired outcomes for subsystems, reports, letters, electronic communications (SMS, email) forms, interfaces, etc. ○ Communicate business processes that are present in operations as well as any manual processes and work with developers to ensure department responsibilities and tasks can be performed efficiently and effectively. ○ Leverage capabilities of new system to improve on business practices and automate in system wherever possible. ○ Coordinate information exchange between end-users and project team as needed to inform system resolution. ○ Work with Agency personnel and keep solution request tracking system up to date for tracking and reporting progress with letters, electronic communication (SMS, email), forms, reports, interfaces, and other development items as needed. ○ Review the definition documentation for accuracy and completeness. • Definition <ul style="list-style-type: none"> ○ Make detail-level decisions on behalf of the agency business in a timely manner on a day-to-day basis. ○ Make written recommendations for decisions that need to be escalated and coordinate resolution. • Program Support <ul style="list-style-type: none"> ○ Maintain business relationship with program areas on an agreed schedule to review project assignments. • Production Support <ul style="list-style-type: none"> ○ Analyze requests from users and determine if it is a training issue, a system issue, a correction, or a change request. ○ Assist production support team members with priority setting and problem resolution.
10%	N	E	Testing <ul style="list-style-type: none"> • Perform ad hoc, scripted testing, and acceptance testing of solution requests, project work, and version upgrades. • Using test scenarios as a basis perform system testing in the applicable environment that follows each scenario but also may include additional testing to vet out potential weak process or system error. • Determine and document the overall test scope for assigned solution requests. Write necessary test scenarios to include regression testing.

			<ul style="list-style-type: none"> • Perform the necessary regression testing in the applicable lower test environment. • Work within and across business units to develop, document, and review test scenarios and ensure they are accurate and comprehensive for all areas. Write test scenarios as necessary based on project work and scope of solution request. • Lead operational and IT testers and act as a liaison between operational testers, Agency and developers during testing of solution requests, project work, service packs, and version upgrades for operational acceptance. • Help to resolve testing errors and perform retests as needed. • Document failed test scenarios and ensure that the correction is retested and accepted. • Sign off on testing for assigned solution request.
10%	N	E	<p>Training</p> <ul style="list-style-type: none"> • Create and maintain end-user training content that includes business process. • Train the trainers in operational areas as needed for solution request release management activities and implementation, as needed. • Provide onboard training for new and rotational SME's and Agency business analysts and IT. <p>Write and edit help content in Agency policies and procedures manually, including reviewing, approving, and publishing both site and core help topics.</p>

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.

Hybrid/remote-home office work environment. Project will be fast paced at times with an emphasis on meeting timelines and working with customers who have competing interest. Must work under time constraints, be able to maintain numerous competing tasks at one time, and determine priorities daily. May require work outside of normal business hours or extending work hours. Travel may be required for training and meetings.

This position requires considerable computer and keyboard use and being seated for extended periods of time. This job requires regular attendance as scheduled by the supervisor.

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.

Real Estate/Escrow statutes & rules (ORS 696 & OAR 863)
Timeshare and membership campground statutes & rules (ORS 94 & OAR 863)
Subdivisions and partitions statutes (ORS 92)
Condominium statutes (ORS 100)

Administrative procedures act (ORS 183)
 Public records law (ORS 192)
 Corporation filing statutes (ORS 57, 58, 59 & etc.)
 Real Estate Agency policy, procedure and desk manuals
 Attorney General opinions and Agency case history
 Agency Standards for Service Delivery
 Familiarity with portions of Federal & State criminal codes and/or terminology
 General Accounting Standards Board rules, policies and procedures

b. How are these guidelines used?

As sources of information for research, analysis, and providing guidance. As models for presenting recommendations, proposals, and analysis. This position may draft changes to some of the above policies and procedures as a result of system changes.

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>			
Managers, Liaisons	In person, phone, writing	Information/requirements gathering, problem resolution, analysis and reporting	Daily
System Users	In person, phone, writing	Problem resolution; analysis; design	Daily
Contractors	In person, phone, writing	QA review; monitor work/contracts	Daily
Division Managers	In person, phone, writing	Review service delivery/performance	Frequently
Vendors	In person, phone, writing	Problem resolution; information gathering, analysis	Frequently
Other State Agencies	In person, phone, writing	Information exchange	Daily
Statewide Technical Groups	In person, phone, writing	Planning/education	Frequently
Real Estate Licensees	In person, phone, email	Conduct audit investigations; provide education in compliance standards	As needed
Oregon DOJ	In person, phone, email	Consult on highly complex policy interpretation and application	As needed
General public	In person, phone, email	Education and training	Daily
Relevant professional organizations	In person, phone, email	Attend conferences and training	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

This position exercises discretion and independent judgment in researching/presenting business and/or technical solutions. Independent action is required although agency management are consulted before final action is taken.

Functional design - Makes configuration decisions affecting functionality of systems in line with business needs.

Testing decisions - Makes decisions about appropriate test material needed to adequately test programs and systems. Make decisions about the accuracy and completeness of tests.

Prioritization decisions. Makes decisions as to the correct priority of tasks to meet project deadlines.

This position makes decisions that impact technical service delivery and software design and development which have impact on the business unit(s) and their production systems. These decisions can greatly affect the functionality of systems as well as the business operations and processes of staff, external partners and customers. These decisions affect the ability of business unit employees to maintain acceptable levels of service to their customers.

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".				
PEM –F, Regulation Division Manager	0005.003	In-person, phone, email	Regularly	Provide general direction. Conduct performance reviews

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? 0
- How many employees are supervised through a subordinate supervisor? 0

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:

REQUIREMENTS:

- Criminal background check with fingerprinting
- Oregon LEDS certification

REQUESTED SKILLS:

- PMI Certification or Oregon Project Management Certification
- Working knowledge of Oregon real estate laws and rules
- Expert proficiency in leading change management

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

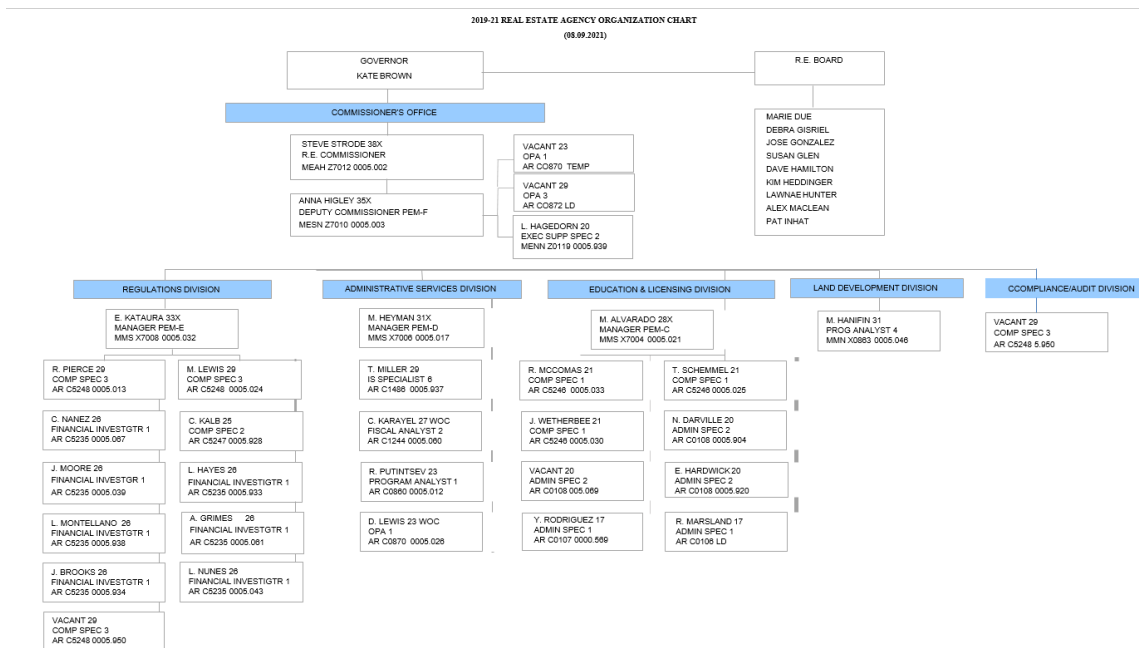
Operating Area	Biennial Amount (\$00000.00)	Fund Type
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Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

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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