

socially determined circumstances. Achieving health equity requires the ongoing collaboration of all regions and sectors of the state, including tribal governments to address: the equitable distribution or redistributing of resources and power; and recognizing, reconciling, and rectifying historical and contemporary injustices.” OHA’s 10-year goal is to eliminate health inequities.

Oregon Health Authority’s core values of partnership, service excellence, leadership, integrity, health equity, innovation, and transparency. In our practice, these values are expressed through:

Health Equity:

- Addressing the clinical and social conditions, as well as the historical and contemporary injustices, which undermine health, so everyone can reach their full health potential.
- Considering the diversity of Oregon’s communities as we make decisions about how policy and practice are developed, and how resources are distributed.
- Respecting diverse cultures, populations, histories, and health practices; ensuring a diverse workforce and inclusive work environment.

Service Excellence:

- Exceeding expectations and being committed to delivering responsive, efficient, and effective solutions.

Integrity:

- Being accountable for maintaining the highest standards and outcomes in all aspects of our work; being a good steward of public trust and resources.
- Ensuring decisions are informed, fiscally responsible, open, and easily understood.

Leadership:

- Ensuring every employee has the ability and opportunity to help make changes that improve health and transform health care.
- Leading improvement in health through innovative strategies and creative solutions.

Partnership:

- Seeking out, listening to, and collaborating with partners across diverse communities; respecting internal and external ideas and opinions.
- Working with key invested partners and communities to protect and promote the health of all people in Oregon.

Innovation:

- Not being satisfied with the status quo and seeking new and better ways to meet the needs of the people we serve with creativity and openness.
- Pursuing opportunities to develop new evidence to evolve our practices.

Transparency:

- Communicating honestly and openly, ensuring our actions are upfront and visible.
- Providing open access to information and meaningful opportunities to provide input and participate in our decision-making.

Fiscal and Operations Division description:

This position is part of the Fiscal and Operations Division (FOD) and reports to the Director of the Office of Actuarial and Financial Analytics (OAFa). The FOD division is responsible for the coordination and oversight of OHA’s agency budget development, Medicaid rate development, Medicaid managed care financial monitoring, and Medicaid program integrity. The division is responsible for the budgeting and in some cases distribution of over \$32.4 billion over two years; which breaks down to \$3.8 billion state public funds, \$10.7 billion other funds and \$17.9 billion federal public funds.

Distribution of funds and accountability of these public funds is a key focus and driver in achieving OHA’s vision and mission to eliminate health inequities in Oregon by 2030. This position will be a change agent to achieve this goal and is weaved in all responsibilities identified.

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:

Provide consultative advice to Medicaid leadership by translating complex actuarial work products and federal regulatory requirements into operational, policy, and administrative recommendations that leadership can act on. Support the state’s financial and actuarial policy functions in response to significant federal and state regulatory changes. Serve as a key contributor in developing, analyzing, and implementing financial policies that ensure compliance with evolving funding structures, eligibility standards, and rate-setting requirements for Oregon’s Medicaid program (e.g., Oregon Health Plan or OHP). A core responsibility of the position is to communicate rate-setting policy and changes to external partners, including CCOs resulting from the new federal legislation, H.R.1.

Within the actuarial and financial space, the position functions as a central coordinator between program leadership (Medicaid and Health Policy), financial teams (OAFa, Budget and OFS), and the state’s actuarial vendor (Mercer). It provides analytical and policy support to evaluate complex fiscal impacts, informs data-driven rate-setting strategies, and supports interagency collaboration to ensure consistent, compliant, and sustainable financial decision-making. The role helps safeguard fiscal integrity and aligns program operations with both state and federal mandates. This position will factor in the perspectives of diverse populations most harmed by social injustice and inequities including communities of color, immigrant groups, the disability and neurodivergent communities, veterans, older adults, individuals identifying as LGBTQIA+ and other communities that have been traditionally marginalized.

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.

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

% of Time	N/R/NC	E/NE	DUTIES
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At all times		E	<p>Align Conduct with OHA’s Values and 2030 Strategic Goal</p> <ul style="list-style-type: none"> • Demonstrate awareness, understanding and alignment in service delivery with the OHA Core Values of Health Equity, Service Excellence, Integrity, Leadership, Partnership, Innovation, and Transparency. • In addition to the cultivation of equitable practices across all aspects of the position description, learn and apply knowledge and skills to interrupt systemic racism and oppression of groups most impacted by historical and contemporary racism and social injustices. • Demonstrate recognition of the value of individual and cultural difference; demonstrate evidence of ongoing development of personal cultural awareness and humility; contribute to an inclusive work environment that is respectful and accepting of diversity and where talents and abilities are valued. • Contribute to a positive and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. • Model professional behavior. Interrupt and report inappropriate behaviors, especially those in violation of policy. • Promote and actively participate in OHA’s 2030 goal of eliminating health inequities. • Hold awareness and be attentive to the direct and indirect accountabilities and opportunities within the Medicaid Division to positively impact and influence the goals, strategies, actions, and measures outlined in OHA’s strategic plan (2024-2027). • Use language that promotes equity, engagement, asset-framing, and power-sharing; when crafting written content or correspondence, reference and adhere to equity-centered communication guidelines outlined in the ODHS/OHA Writing Style Guide.
50%		E	<p>Actuarial & Financial Policy Development and Implementation:</p> <ul style="list-style-type: none"> • Research, analyze, and evaluate federal and state regulatory changes, including H.R. 1, to assess impacts on funding structures, eligibility rules, rate-setting policy, and unit operations. • Draft, refine, and recommend financial and actuarial policy options to ensure compliance and fiscal sustainability. Implement selected decisions.

			<ul style="list-style-type: none"> • Prepares and presents policy briefs and decision memos to Division and OHA leadership with recommendations on financial policies and rate setting requirements. • Coordinate policy development across Medicaid, Health Policy, OAFA, OFS, Budget, and the actuarial vendor to ensure alignment and consistency. Ensure operational execution. • Support current OPA4 in evaluating MLR performance, identifying emerging fiscal risks, and assessing potential corrective actions. • Track, document, analyze, and report program changes across the CCO program to identify impacts on rate-setting and financial stability. • Develop and maintain templates, documentation standards, and policy materials for risk corridor processes. • Provide analytical support for risk mitigation strategies and ensure alignment with state and federal requirements.
10%		E	<p style="text-align: center;">Legislative Coordination:</p> <ul style="list-style-type: none"> • Review proposed and enacted state and federal legislation to identify financial, actuarial, and operational impacts to Medicaid programs and OAFA's role supporting those programs. • Support leadership in preparing and administering fiscal, policy, and operational responses to legislated changes. • Track implementation requirements associated with H.R.1 and other relevant legislation and communicate updates to internal stakeholders. • Coordinate with Legal, Budget, and Policy teams to ensure legislative compliance is incorporated into program and rate-setting decisions.
10%		E	<p style="text-align: center;">Operational Research & Evaluation:</p> <ul style="list-style-type: none"> • Conduct financial and actuarial research to evaluate the impacts of policy changes on program operations and rate-setting; participate in establishing and maintaining updated operations. • Interpret complex data analysis to identify trends, fiscal risks, and cost drivers associated with CCO performance and federal policy changes. • Develop evaluation frameworks and analytic tools to support evidence-based decision-making. • Synthesize research findings into clear recommendations for leadership and external partners.
20%		E	<p style="text-align: center;">Project Management:</p>

			<ul style="list-style-type: none"> • Internal project management: <ul style="list-style-type: none"> ○ Lead and coordinate internal workstreams related to HR1 implementation, rate-setting policy updates, and fiscal analysis. ○ Develop project plans, timelines, and deliverables, ensuring cross-team alignment across Medicaid, Health Policy, OAFAs, Budget, and OFS. ○ Monitor progress and risk areas, escalating issues and recommending mitigations as needed. • External project management: <ul style="list-style-type: none"> ○ Serve as liaison to the state’s actuarial vendor, Mercer, ensuring deliverables meet policy, analytical, and timing requirements. ○ Manage vendor workplans related to HR1 financial analysis, rate development, and fiscal forecasting. ○ Coordinate data requests, technical reviews, and quality assurance with internal teams. ○ Facilitate communication between Mercer and CCOs regarding actuarial assumptions, rate-setting methodology, outlier trends, and implementation timelines. ○ Report the authority’s preliminary capitation rate determinations to the Oregon Health Policy Board
5%		E	<p style="text-align: center;">Technical Consultation and Advice</p> <ul style="list-style-type: none"> • Maintains regular contact with OHA leadership and staff, legislators, and community partners and providers to answer questions and gather information on financial policies and rate setting requirements. • Provides consultation on training development, reviewing and revising materials, offering training when appropriate, and identifying training needs for complex fiscal policy areas, quality assurance and compliance. • Prepare and participate in presentations for CCOs explaining rate-setting methodology, HR1-driven policy changes, and fiscal impacts. • Develop clear communications for external partners, including policy memos, guidance documents, and technical explanations. • Support leadership in key partner engagement by translating complex actuarial and fiscal concepts into accessible formats. • Respond to inquiries from CCOs and other partners regarding rate-setting and financial policy.
5%		NE	<ul style="list-style-type: none"> • Other duties as assigned.

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.

The person in this position will work a professional work week, Monday through Friday. Some evening and/or weekend work may be required, especially during legislative session.

The job requires frequent preparation, presentation, and/or response to technical and professional material against assigned deadlines. Work product can be highly visible, and of significant interest to legislative representatives, multiple partner groups and/or state agencies and associations. Workload and priorities fluctuate and can involve highly complicated, sensitive, and/or political issues. May experience stressful situations due to unchangeable project and program timelines.

This professional collaborative position relies upon positive, productive, and respectful engagement with leadership and subject matter experts within the Division, across the Agency / state agencies, representatives of local government / governor's office, and with key invested members, partners, and providers within Oregon communities.

Occasional local and in-state travel is required. Occasional out-of-state travel may be required.

This is a hybrid role that will require up to 0.2 FTE or 8 hours a week in-person to support OAFA needs. As agency business and operational needs allow, there is flexibility to perform work remotely within the defined workweek.

When working remotely, the current structure relies upon Division issued equipment, utilizing the employee's internet network and activation of secure network software to connect to OHA's Virtual Private Network, and utilizing on camera virtual meetings.

Frequent contact and work with a variety of staff, colleagues, and partners in a variety of office, virtual and meeting room settings is expected. Open office environment or virtual environment with frequent interruptions while working on multiple projects simultaneously. Continuous use of computer and communication devices/ applications. Multiple communication streams including email, instant message, and cell phone. These are daily conditions.

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 Regulations (including but not limited to Medicare and Medicaid regulations and Health Insurance Portability and Privacy Act)
 - Federal legislation impacting Medicaid financing, including H.R.1 and related CMS implementation guidance

- CMS actuarial soundness requirements, rate-setting guidance, medical loss ratio, risk mitigation and federal managed care rules and requirements
- Experience planning and executing complex budgets.
- Experience working with complex funding streams.
- Experience with state budget processes.
- National best practices and fidelity models promoted by key federal agencies
- OHA/Coordinated Care Organization Contracts, including financial reporting, rate development, and risk mitigation requirements
- Oregon Revised Statutes
- Oregon Administrative Rules
- State laws, rules, and contract requirements relating to Medicaid services
- Oregon Procurement Laws and Guidelines
- OHA/ODHS Human Resource policies and procedures
- Oregon Department of Administrative Services (DAS) policies and procedures
- Departmental and office policies and procedures
- Collective Bargaining Agreement
- Local requirements as appropriate
- OHA Tribal Consultation & Urban Indian Health Program Confer Policy
- Trauma Informed Approaches
- Organizational Effectiveness strategies
- Continuous Improvement strategies

b. How are these guidelines used?

As parameters and reference to perform as an expert and to effectively consult and act as a liaison with leadership and staff in shaping, defining and prioritizing activities and priorities.

As parameters and reference to assure compliance with best practice and applicable laws, rules, policies and regulations and cost allocation. May also serve to guide strategic planning. The work of OHA is governed and administered within the context of these laws, rules and policies.

These guidelines provide basic data for ongoing management and establishing, monitoring, and coordinating program policies and procedures for the assigned programs within the legislatively approved budget.

SECTION 6. WORK CONTACTS

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

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

Who Contacted	How	Purpose	How Often?
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OHA Management	In-person; Virtual (e.g. MS Teams, Zoom); Written (e.g. email, letter/memo, report); Phone	Collect, provide and discuss information and data; collaborate and coordinate on policies, programs, and operations; provide and receive direction or consultation; answer questions; gather input; enforce policies, regulations and contracts; negotiate agreements	Daily, as needed
OHA Staff; Other State Agency Staff	In-person; Virtual (e.g. MS Teams, Zoom); Written (e.g. email, letter/memo, report); Phone	Collect, provide and discuss information and data; collaborate and coordinate on policies, programs, and operations; provide and receive direction or consultation; provide technical assistance; answer questions; gather input; enforce policies, regulations and contracts; negotiate agreements	Daily, as needed
Coordinated Care Organizations (CCOs); CCO Sub-contractors	In-person; Virtual (e.g. MS Teams, Zoom); Written (e.g. email, letter/memo, report); Phone	Collect, provide and discuss information and data; collaborate and coordinate on policies , programs, and operations; provide and receive direction or consultation; provide technical assistance; answer questions; gather input; enforce policies, regulations and contracts	Weekly, as needed
Department of Justice (DOJ)	In-person; Virtual (e.g. MS Teams, Zoom); Written (e.g. email, letter/memo, report); Phone	Collect, provide and discuss information and data; provide and receive direction or consultation as it relates to regulations, rules, contracts and the implications of policy or program actions or activities	As needed
Legislators, their offices and legislative staff; Governor's Office and staff	In-person; Virtual (e.g. MS Teams, Zoom); Written (e.g. email, letter/memo, report); Phone	Collect, provide and discuss information and data; provide and receive direction or consultation; provide technical assistance; answer questions; gather input; provide bill analysis; prepare hearing testimony	As needed

SECTION 7. POSITION-RELATED DECISION MAKING

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

Always determine the impact of programs, policies, operations, budgets, and all other aspects of the program on health equity.

Ensure decisions prioritize the equitable distribution or redistribution of resources and power and recognize, reconcile and rectify historical and contemporary injustices.

Develop and make recommendations on actuarial and financial policies, operational changes, quality assurance oversight, and system and process needs related to successful coordination across internal and external resources. Decisions impact the success of managed care payments which underline service delivery for recipients of medical assistance programs. Decisions made will likely result in political and public reactions to policy changes.

Monitor and recommend improvements to the actuarial and financial management of the CCO program as it relates to H.R. 1, and other legislative initiatives.

The decisions in this position require a high degree of complicated conceptual, critical, and analytical thinking as well as knowledge of medical/health programs, practices, standards and budgets. The person in this position must apply these skills and knowledge within the limitations and opportunities extant in state and federal law, rule, and guidance. These decisions significantly influence the management of expenditures and access to quality medical care for the 1.4 million recipients of medical assistance within Oregon.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

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

Classification Title	Position Number	How	How Often	Purpose of Review
Budget and Fiscal Administrator 2 CCO Finance Director	9402036	Virtually, In person, Phone, Email, written form	Daily to Weekly, and as needed	Communicate updates on progress of major tasks and projects; Ensure project and program decisions meet federal, agency and user requirements; Promote quality assurance, strategic plan alignment, and equitable outcomes; Discuss and review goals, performance, expectations and training needs; Promote problem-solving and solution-seeking
Budget and Fiscal Manager 3 Chief Actuary	1003386	Virtually, In person, Phone, Email, written form	Daily to Weekly, and as needed	Communicate updates on progress of major tasks and projects; Ensure project and program decisions meet federal, agency and user requirements; Promote quality assurance, strategic plan alignment, and equitable outcomes; Discuss and review goals, performance, expectations and training needs; Promote problem-solving and solution-seeking

SECTION 9. OVERSIGHT FUNCTIONS

- 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 and 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.

All positions in OHA require a Criminal Background Check and an Abuse/Neglect Check. Fingerprints may be required.

1. Experience the development and implementation of policies and programs at the community, state, and/or national level that advance health equity (address systemic health disparities, expand culturally responsive and inclusive services, factor in social determinants of health) and elevate the voice of community and those with lived experience.
2. Knowledge of health services delivery systems, particularly the Oregon Health Plan/ Medicaid administration in Oregon, including experience working with Coordinated Care Organizations.
3. Knowledge of legislative and regulatory processes; experience analyzing, applying and advising on relevant federal and state Medicaid laws and regulations as well as legislative concepts/bills; specific knowledge of Oregon Administrative Rules and Oregon Revised Statutes is valued.
4. Knowledge of complex health care finance and accounting systems.
5. Ability to foster intraagency collaboration and to facilitate coordination of policies, programs, and continuous (performance / quality / process) improvement strategies.
6. Strong oral and written communication skills across a variety of forums.
7. Experience and knowledge evaluating and synthesizing quantitative and qualitative data to analyze and measure the effectiveness, efficiency, and impact of administrative and technical programs within the context of health policy / healthcare services.
8. Experience presenting and articulating the value and relevance of research and evaluation data to facilitate quality assurance, strategic planning, and decision-making.
9. Demonstrated project management experience, including ability to effectively manage multiple project timelines and priorities and promote human-centered change management.
10. Ability to demonstrate advanced Microsoft Excel, Word, PowerPoint, Visio and Outlook skillset; and skilled use of collaboration tools such as Microsoft Teams, SharePoint, and Smartsheet.
11. Strong oral and written communication skills across a variety of forums; experience communicating qualitative and quantitative information, verbal and written, that are accessible to and understood by audiences with different levels of comprehension or interest and that are culturally responsive, inclusive, and appropriate.
12. Knowledge and experience developing, implementing, and refining policies included in the Medicaid state plan or other waiver authorities with Centers for Medicare and Medicaid Services (CMS).
13. Experience using a wide variety of research and evaluation methods, including quantitative, qualitative and mixed methods; demonstrated skill in presenting and articulating the value and relevance of data, research, and administrative studies.
14. Experience in producing written reports, experience in presenting data for lay audiences / data visualization / data analysis / information summarization with corresponding software expertise.

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

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

Operating Area	Biennial Amount (\$00,000.00)	Fund Type
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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

Donna Hanks

Appointing Authority Signature

May 5, 2026

Date