



**STATE OF OREGON
Oregon Health Authority (OHA)
POSITION DESCRIPTION**

Position Revised Date:
M / D / YYYY

Agency: Oregon Health Authority

Division: Oregon State Hospital

☐ New

☒ Revised

This position is:

☐ **Classified**

☐ **Unclassified**

☐ Executive Service

☐ Mgmt Svc – Supervisory

☒ Mgmt Svc – Managerial

☐ Mgmt Svc – Confidential

SECTION 1. POSITION INFORMATION

- a. Classification Title: Operation & Policy Analyst 3
- b. Classification No: C0856 c. REPR Code: _____
- d. Position No: WD: _____ ; PPDB: _____
- e. Working Title: Portfolio Management Analyst
- f. Agency No: 44300
- g. Section Title: Portfolio Management Office
- h. Employee Name: _____
- i. Work Location (City — County): Salem – Marion County
- j. Supervisor Name: _____
- k. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share
- l. FLSA: ☒ Exempt If Exempt: ☐ Executive ☐ Professional ☒ Administrative ☐ Computer
☐ Non-Exempt
- m. 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.

OHA values health equity, service excellence, integrity, leadership, partnership, innovation, and transparency. OHA's health equity definition is "Oregon will have established a health system that creates health equity when all people can reach their full potential and well-being and are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class, intersections among these communities or identities, or other 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 redistribution of resources and power; and recognizing, reconciling, and rectifying historical and contemporary injustices.” OHA’s 10-year goal is to eliminate health inequities.

The Oregon State Hospital (OSH) Division is aligned with the 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:

Service Excellence:

- Understanding and responding to Oregon public health needs and the people we serve
- Pursuing our commitment to innovation and science-based best practices
- Fostering a culture of continuous improvement

Leadership:

- Building agency-wide and community-wide opportunities for collaboration
- Championing public health expertise and best practices
- Creating opportunities for individual development and leadership

Integrity:

- Working honestly and ethically in our obligation to fulfill our public health mission
- Ensuring responsible stewardship in public health resources

Health Equity:

- Eliminating health disparities and working to attain the highest level of health for all people
- Ensuring the quality, affordability, and accessibility of health services for all Oregonians
- Integrating social justice, social determinants of health, diversity, and community

Partnership:

- Working with partners and communities to protect and promote the health of all Oregonians
- Seeking, learning from, and respecting internal and external ideas and opinions
- Exploring and defining the roles and responsibility of public health staff and partners

Innovation:

- We are not satisfied with the status quo if there are new and better ways to meet the needs of the people we serve. We bring creativity, experience, and openness to our search for solutions to problems. We pursue opportunities to develop new evidence to evolve our practices.

Transparency:

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

Section/unit description:

The OSH Portfolio Management Office provides the organizational expertise to align, scope, facilitate, and manage Senior Leadership Team-sponsored initiatives and projects of all sizes. The primary mission of the Portfolio Management Office is to manage OSH’s entire portfolio of improvement work so changes across the hospital can be fully understood, strategically

deployed, coordinated, highly visible, and well executed. Caregivers in this department possess the skills required to provide project structure and rigor. They are also skilled in employing a variety of tools to support improvement-related organizational needs.

- 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 Portfolio Management Analyst (PMA) leads cross-functional projects from initiation through successful completion, ensuring alignment with organizational priorities, timelines, and resource capacity. This role oversees all phases of the project lifecycle—including planning, execution, monitoring, risk management, change control, and closeout—while facilitating collaboration and clear communication between vested parties. The PMA uses structured project management methodologies, tools, and techniques to deliver efficient, well-coordinated, and high-quality outcomes that improve organizational performance.

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
20%			Project Planning and Initiation - Oversee and coordinate engagement with sponsors, vested parties, and subject matter experts to define project scope, goals, success criteria, and deliverables. - Manage and direct the development of comprehensive project charters, work plans, schedules, resource plans, and communication plans. - Guide and facilitate problem definition, requirements gathering, and alignment on desired outcomes. - Support and oversee the development of business cases by evaluating feasibility, risks, dependencies, and organizational impacts.
20%			Execution and Leadership - Lead and coordinate project teams through each phase of the project lifecycle, ensuring clarity of roles, responsibilities, and expectations. - Direct and facilitate effective team meetings, decision-making processes, and cross-department collaboration. - Monitor and manage project performance, adjusting plans proactively to address issues, resource needs, or emerging risks.

			• Maintain and oversee strong communication channels with sponsors, leaders, and vested parties to ensure alignment and transparency.
15%			Risk, Issue, and Change Management • Manage and track project risks and issues, escalating when appropriate to maintain project momentum. • Develop and coordinate contingency plans, guiding teams through structured issue resolution processes. • Oversee and administer formal change control processes to assess impacts on scope, timelines, cost, and resources. • Ensure and direct full documentation, communication, and approval of all project changes.
15%			Tracking, Reporting, and Documentation • Manage and maintain detailed project documentation, including status reports, timelines, risk logs, decisions, and change records. • Prepare and deliver clear, data-informed updates, presentations, and summaries for leadership and key stakeholders. • Monitor and verify that performance metrics and deliverables meet quality, compliance, and strategic standards. • Coordinate closely with the PMO to ensure alignment with organizational project management methodologies.
10%			Vested Parties and Communication Management • Cultivate and maintain strong working relationships with leaders, project sponsors, and team members across departments. • Direct and facilitate stakeholder engagement through structured communication, documentation, and transparent reporting. • Manage and guide expectation-setting processes to ensure alignment across departments and impacted operational areas.
10%			Process, Workflow, and Operational Alignment • Oversee coordination with business analysts, performance improvement analysts, and subject matter experts to develop accurate process maps, workflows, and operational requirements.

			• Ensure and manage integration of project deliverables into existing processes, systems, and operational structures. • Direct participation in Gemba walks or on-site observations when needed to validate workflows and understand operational impacts.
10%			Implementation and Closeout • Coordinate and oversee go-live planning, readiness assessments, communication activities, and training support. • Ensure and direct sustainable handoff of new processes, systems, or workflows to operational owners. • Manage and finalize project closeout activities, including lessons learned reviews and formal evaluations. • Identify and assess opportunities for ongoing improvement or follow-up initiatives
Ongoing			Cultural Competency and Diversity • Consistently treat consumers and co-workers with dignity and respect. • Use a culturally diverse approach in all interventions. • Demonstrate sensitivity to cultural difference among caregivers, patients, and their families. • Demonstrate recognition and appreciation of the value of individual and cultural differences. • Assure that service delivery is provided in a culturally competent way, including availability of printed materials in alternative languages and/or formats and use of appropriate interpretive services for patients and their families or guardians. • Facilitate and support caregivers participation, diversity training, and multicultural events. • Utilize hospital resources for assistance with service delivery issues.
Ongoing			Core Values • Demonstrate awareness, understanding, and alignment with OHA core values of service excellence, leadership, integrity, health equity, partnership, and OSH core values in promoting safety, inspiring hope, and supporting recovery.

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.

This position is in an office environment within a psychiatric hospital and requires frequent movement throughout hospital units and other work areas. The work involves in-person interactions with caregivers, hospital leadership, and occasionally patients. Physical demands include sitting, standing, walking, and occasional lifting of materials or equipment. Sensory demands include extended periods of computer use, reading detailed documents, and active listening during meetings and interviews. Environmental conditions include exposure to a secure hospital setting with controlled access, frequent proximity to psychiatric patients, and potential exposure to infectious diseases. The position requires adherence to hospital safety protocols and infection control measures. Noise levels may vary from quiet office settings to active treatment units. Emotional resilience and situational awareness are essential due to the nature of the hospital environment.

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, Oregon Administrative Rules, OSH Policy and Procedure Manual, DHS Policies, Federal Regulations, The Joint Commission (TJC) standards, project management institute standards of practice and guidelines, lean methods and tools, facilitation techniques, executive and management coaching methods, process improvement, process re-engineering, and business change methods.

- b. How are these guidelines used?**

To facilitate project management activities, process improvement and process re-engineering projects, breakthrough initiatives, and Kaizen events. These guidelines and methods facilitate OSH leadership decisions regarding prioritizing change initiatives and tracking outcomes. Additionally, these guidelines are used to assure hospital compliance and to maintain funding. Guidelines, policies, and procedures are also a minimum guide for maintaining a high level of patient care at OSH.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact? When applicable, please identify contacts that might be virtual/in-person, or both.

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?

SECTION 7. POSITION-RELATED DECISION MAKING

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

The PMA exercises significant leadership influence by making decisions that shape the hospital's operational performance, project outcomes, and alignment with strategic goals. In this role, the PMA determines project scope, establishes priorities, and advises leadership on the selection and sequencing of improvement initiatives. The PMA also recommends resource allocation strategies, including staffing needs, budget considerations, training requirements, and the timing of major implementation activities.

The PMA evaluates operational risks associated with proposed changes and designs mitigation strategies to ensure safe and effective project execution. As part of their oversight responsibilities, they determine the structure of project work plans, guide decision-making processes within project teams, and recommend corrective actions when timelines, resources, or outcomes are at risk. The PMA also makes decisions about stakeholder engagement approaches, communication strategies, and readiness planning to support successful adoption of new workflows or systems.

These decisions have a direct and far-reaching impact on the hospital's operations, patient care, and organizational effectiveness. Effective decision-making by the PMA improves caregiver workflow efficiency, strengthens coordination across departments, and supports cost-effective use of hospital resources. Their recommendations directly influence the organization's ability to enhance service quality, reduce operational barriers, and implement changes that improve patient outcomes. The PMA's work contributes to maintaining a well-prepared and knowledgeable workforce, which is essential to patient safety, therapeutic progress, and continuity of care.

The position plays a critical role in ensuring that Oregon State Hospital remains responsive, efficient, and aligned with organizational priorities—ultimately affecting both the mental and physical health of the patients served.

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
Business Operations Manager 3	000000038493	Meetings, email, virtual, and phone	Daily/As needed	Provide feedback, offer expertise, and provide vision.

SECTION 9. OVERSIGHT FUNCTIONS *(Supervisory positions only)*

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

Valid driver license with an acceptable driving record or ability to provide alternate transportation.

Knowledge of:

- Project lifecycle management
- Organizational and systems awareness
- Risk and issue management
- Communication and stakeholder engagement
- Critical thinking and problem solving
- Facilitation and team leadership
- Change management awareness
- Documentation and detail orientation
- Adaptability in dynamic environments

Skills to:

- Apply project management techniques in hospitals and healthcare settings.
- Apply lean methodology and lean implementation in hospitals and healthcare settings.
- Apply change management principles for assignment implementation.
- Apply high-performance team building strategies.
- Facilitate large and small scale improvement events with a variety of vested parties.
- Apply strong leadership skills and techniques related to project management, continuous improvement, and change management.
- Analyze and interpret data and processes to provide recommendations and solutions.

- Identify measures (or indicators) of system performance, and the actions needed to improve or correct performance relative to the goals of the system.
- Develop specific goals and plans to prioritize, organize, and accomplish work.
- Use logic or reasoning to identify the strengths and weaknesses of alternative solutions.
- Develop constructive and cooperative working relationships with others, and maintain them over time.
- Use a personal computer and software typical to project management, spreadsheets, and word processing.
- Disseminate communication throughout organizations, obtaining buy-in, and facilitating business transition and change management.

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
N/A		

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