Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR’s Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR’s website does not indicate CalHR support for the proposal.

### A. GENERAL INFORMATION

<table>
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<tr>
<th>1. Date</th>
<th>2. Department</th>
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<tbody>
<tr>
<td>2022-05-04</td>
<td>Office of Digital Innovation</td>
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3. **Organizational Placement (Division/Branch/Office Name)**

CalInnovate

4. **CEA Position Title**

Research & Discovery Management Lead

5. **Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)**

Per the California Government Code section 12815, the mission at the Office of Digital Innovation (ODI) is to deliver better government services to the people of California through technology and design. This position will be establishing the policies and procedures, overall user research strategy and driving user research excellence for ODI development teams, state agency partners, ultimately impacting how Californians find information about and engage with state services in an accessible manner. This will allow ODI to make meaningful change as required per its Government Code.

6. **Reports to: (Class Title/Level)**

Deputy Director, User Research (Exempt)

7. **Relationship with Department Director (Select one)**

- [x] Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.

- [ ] Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

   *(Explain):*  

8. **Organizational Level (Select one)**

- [ ] 1st  
- [x] 2nd  
- [ ] 3rd  
- [ ] 4th  
- [ ] 5th (mega departments only - 17,001+ allocated positions)
B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Under the administrative direction of the Deputy Director, User Research, the Research and Discovery Manager is responsible for developing and maintaining the policies and procedures for the Office of Digital Innovation’s (ODI) user focused research and discovery practices. In this role, the incumbent manages a multi-disciplinary team of researchers and analysts. The incumbent oversees the development and execution of research plans, identifies and validates research methods, and ensures the communication of evidence-based insights to clients. The incumbent is responsible for ensuring that a detailed and accurate understanding of the problem space is developed, that a clear problem statement is articulated, and that data-driven recommendations and solutions are provided. The incumbent is a leader in establishing user research as a commonly applied practice in state government. The incumbent plays a significant role in the decision-making and development of priorities, policies, and practices pertaining to projects, strategic planning, technical direction, resource management, and program delivery. Duties include but are not limited to, the following:

- Manage the development and execution of research plans, including identifying and validating research methods, reviewing data and analysis, and report and presentation creation
- Develop policies and procedures for focused research and discovery practice in state government, including the development of best practices, playbooks, and policy guidance
- Coordinate with ODI management to prioritize problem areas and project execution in order to direct resources and efforts
- Partner with ODI user research management to identify areas of opportunity to advance our research and discovery practices, policies, and procedures
- Provide expertise on how ODI’s external agency partners can integrate innovative and emerging technologies, and adapt policies and procedures to improve delivery against their strategic goals
- Advise the Deputy Director, User Research in the formulation of state service research and discovery policies and procedures
- Collaborate with ODI internal teams and ODI leadership on strategy & business development, developing and implementing a high-level strategy for ODI project identification, acquisition, and engagement
- Consult with the Deputy Director, User Research relative to state and office initiatives, policies, and standards in support of ODI’s goals and objectives
- Advise the Deputy Director, User Research regarding major issues confronting the office
- Assess the current state of digital services provided by state government, working to provide a research-driven and data informed understanding of opportunities for change and to align strategies and practices to intended outcomes
- Partner with ODI leadership to understand partner needs, industry trends, and opportunities that align with ODI’s capabilities to grow the agency’s portfolio
- Create and oversee research of intended subject matter according to ODI priorities, transforming business needs into business logic to inform data exploration and analysis
- Identify systems level change and opportunities for statewide policy changes on how government delivers services online
- Maintain a broad understanding of our current and future agency partner’s strategies, drivers, goals, and initiatives, as well as the competitive landscapes to enable the capture of growth opportunities
- Cultivate, expand, and maintain positive relationships across a deep network of senior leadership and key stakeholders across the state government to maintain a holistic understanding of the customer, needs, and priorities
- Support and scale ODI’s User Research function and improve competencies of other state teams through playbooks, approaches, communities of practice, and other training channels
- Oversee managerial activities by providing inclusive leadership to direct reports and matrixed staff members, encourages team building, and facilitates cross training, creating a positive working environment
- Direct, lead, train, develop, and assign tasks/projects to team members
- Establish individual performance expectations, lead performance management activities, including continuous feedback to team members, complete annual individual development plans and complete timely probationary reports for civil servants
- Supervise the work of researchers and analysts, providing guidance, teaching, and contributing to staff professional development
- Review contract performance for contract staff as guided by ODI’s administrative staff
- Update duty statements and contract SOWs, as needed
- Represent ODI at agency partner, industry, and/or tradecraft opportunities (e.g., conferences, meetups, working groups, memberships, and trainings) to build relationships, establish partnerships, and grow ODI’s portfolio
- Analyze and scope the technical and policy requirements needed to implement complex digital solutions and collaborate with other entities, such as the California Department of Technology among others
- Create and manage reports, presentations, and other tools for delivering findings and recommendations to internal and external stakeholders
- Apply principles, practices, and trends of public administration, including management, organization, planning, cost/benefit analysis, budgeting, and project management, and perform other staff assignments as appropriate and required
- Execute programs, policies, and platforms that support digital innovation
10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

☑️ Program is directly related to department's primary mission and is critical to achieving the department's goals.

☐ Program is indirectly related to department's primary mission.

☐ Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: Per the California Government Code section 12815, the mission at the Office of Digital Innovation (ODI) is to deliver better government services to the people of California through technology and design. The user research program is mission critical for ODI to deliver on its mission and strategic directives. This position will be establishing the policies and procedures, overall user research strategy and driving user research excellence for ODI development teams, state agency partners, ultimately impacting how Californians find information about and engage with state services in an accessible manner. This will allow ODI to make meaningful change as required per its Government Code. Implementing change to make services more accessible requires data driven solutions that take into account a comprehensive overview of the services, those who utilize and/or are impacted by them, and how services can be improved through innovation. The CEA will be responsible for setting departmental and statewide policy on user research programs. ODI will not be successful without the user research function providing key information, research, analysis, etc. for the state to deliver efficient and effective services for Californians.
B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

ODI was established with the directive to enhance the usability and reliability of the state’s most important services by using business process improvement and leveraging digital innovation, as appropriate, to transform government services. As a newly formed office, ODI is now progressing through the next stages of organizational development. ODI’s initial digital services projects and innovations demonstrated a need for a high level, policy influencing position to provide discovery-based, user-centered research programs that are consistent with the needs of the projects and supportive of ODI’s mission and responsibility to deliver better government services to Californians in an innovative and sustainable manner. Further, as part of the maturation of ODI, there are needs for high-level leadership positions within the organization and this request reflects one of those needs. This position was approved in FY19/20 BCP as part of the establishment of this new program.
C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The following section highlights the mission critical priorities for ODI and those that this position will have direct policy and procedure ownership, resulting in statewide agency impact and impact to Californians.

The Research and Discovery Manager will be responsible for defining the policies and procedures related to research and discovery for ODI and in so doing will inform and encourage the adoption of user research and discovery practices across state agencies, directly contributing to systems-level change and impacting the experience of Californians, as is required to fulfill ODI’s mission.

This position will be responsible for the creation of research-focused policies and procedures in line with ODI’s mission and strategic objectives that guide agency partners and benefit all Californians.

This will include developing standardized and scalable user research and discovery guidance, training and best practices, to help departments improve service delivery. This work will include developing guidance, training and best practices around human-centered methodologies like conducting interviews with state staff to better understand blockers and opportunities facing departments as they work to deliver services; conducting interviews with residents, the end users, to better understand the blockers and opportunities they face when trying to access services; conducting surveys to engage directly with residents to better understand their needs, concerns, and behaviors at scale; conducting research and discovery to inform problem identification; or translating business needs into business logic to inform research and analysis which would result in evidence based insights, recommendations, and solutions.

Creating standardized and scalable policies and procedures will address current statewide complex digital issues, gaps, and resident barriers and will foster collaborative efforts with ODI and agency partners to provide greater service accessibility for Californians.

This position will be responsible for defining the policies and procedures related to the collection, analysis, and validation of research which will be used by ODI and agencies across the state to understand the needs of Californians, which has a direct impact on the experiences of Californians trying to access government services.
### C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position’s scope and nature of decision-making authority?

The CEA serves as a principle policy maker and an advisor to the Deputy Director, User Research on policy related to user research, discovery, and insights. This position’s scope and nature of decision-making is broad and includes the development, establishment, and implementation of policies and procedures related to user research programs on ODI’s behalf. The policies they develop have large impact and statewide visibility, such as deploying user intercepts on covid19.ca.gov to inform content and design or investigating internal site search to inform policy guidance. To ensure policies are appropriate and can be implemented, this position must consider the new and/or revised state and federal legislation and budgeting needs as well as incorporate timely feedback from stakeholder groups, providers, local, state, and federal governmental entities. The CEA has the responsibility to help ensure that new or existing initiatives, projects, and processes are implemented in accordance with the Department's mission, policies and procedures, as well as federal and state laws. This position will provide critical briefings and recommendations to the Directorate on highly critical and sensitive issues related to user research practices for digital services across the state.

- This position provides strategic leadership and technical, operational, and managerial leadership for successful implementation of the user research functional groups across ODI and ensures that the program is technically sound, evidence-based, and consistent with the department’s and stakeholders’ priorities. This position will ensure that ODI and agency partners are trained and well versed in the policies and processes that are necessary to maintain compliance with statutory and policy requirements.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

This position will be developing and implementing new policies, as state and federal legislation, regulations, and policies change and are updated as well as interpreting and implementing existing policies related to discovery-based, user-centered research programs. As changes occur, the CEA will be responsible for developing and implementing new policy to ensure ODI is in compliance with new legislation. This will involve work not only within the department and with existing stakeholders, but coordinating with other entities such as the Governor's Office, California Department of Technology, GovOps, California Health and Human Services, Employment Development Department, Department of General Services, Labor & Workforce Development Agency, etc. to identify, define and deploy new policies and procedures with impact across state agencies and directly impacting Californians. The CEA will consistently consider sustainability in practice to ensure policies and procedures can be easily updated to accommodate evolving business and stakeholder needs.