

CEA POSITION REQUEST INSTRUCTION

GENERAL INFORMATION

This form must be completed for any of the following:

- New CEA position (Public comment period required per CCR, title 2, section 548.5)
- Revision of existing CEA allocation - Major change to existing CEA allocation (Public comment period required per CCR, title 2, section 548.5)
- Revision of existing CEA allocation - Minor change to existing CEA allocation, such as title change, etc.
- Reactivate inactive CEA position within 5 years. "Inactive" refers to an established CEA concept shelved by department for 5 years or less.
- A CEA position inactive beyond 5 years is considered a new allocation request. (Public comment period required per CCR, title 2, section 548.5)
- Level change (CalHR approval required for non-delegated departments)

CalHR requires these documents for any requests that receive a public objection:

- A Letter of Support from highest level Governor-appointed official
- A signed, completed CEA Position Request form
- A proposed duty statement with percentages (and a current duty statement, if applicable).
- Current and proposed organization charts showing the proposed position. (Please omit any shading and identify position on chart, and save in PDF format when submitting to CalHR.)
- Organization chart(s) depicting all the CEA and Exempt positions in the department. (Save in PDF format when submitting to CalHR.)

HOW TO COMPLETE THE CEA POSITION REQUEST FORM

Complete all applicable items on Pages 2-13 of the CEA Position Request form. For detailed instructions on completing the form, see below. The numbered items correspond to the numbered boxes on the form.

SECTION A. REQUEST TYPE

- (1) Select appropriate box. If revising or reactivating an existing CEA position, attach a copy of original package.

SECTION B. GENERAL INFORMATION

- (2) Enter the date the CEA request is submitted.
- (3) Enter the official name of the requesting department.
- (4) Enter the name of the division/branch/office in which the CEA position resides.
- (5) Enter the CEA position title (Example: Deputy Director, Administration).
- (6) Enter the CEA position number. Use "xxx" as the serial number if the position has not been established.
- (7) Provide a brief description of the CEA position. See sample language below.
- NEW CEA Position:**
The <insert department name> proposes to allocate the above position to the CEA category. The <insert position title> will be responsible for <insert brief summary of position responsibilities.>
- REVISE CEA Position:**
The <insert department name> proposes to revise the above CEA allocation. The <insert position title> is responsible for <insert brief summary of position responsibilities.>
- REACTIVATE INACTIVE CEA Position:**
The <insert department name> proposes to reactivate the above inactive CEA allocation. The <insert position title> is responsible for <insert brief summary of position responsibilities.>
- LEVEL CHANGE CEA Position:**
The <insert department name> proposes to upgrade the <insert position title> from a level <insert level number> to level <insert level number.>
- (8) Enter name, title, phone, and email address of department human resource contact that can respond to CalHR inquiries.
- (9) Enter name, title, phone, and email address of department approving authority.
- (10) Select type of position function. Select one or check "Other" and explain.

SECTION C. ORGANIZATIONAL LEVEL CONSIDERATIONS

- (11) Fill in proposed total staff, include direct and indirect reports. Identify bargaining units that are tied to the position.
- (12) Identify class title and level of position that proposed CEA will report to.
- (13) Enter the proposed CEA's budget responsibility in dollars.
- (14) Select appropriate box or check "Other" and explain. "Executive Management Team" is defined as persons who are regularly involved in policy making at the department level.
- (15) Fill in size of department and number of positions as requested. If department has a large number of contracted or temporary employees, explain in question 39.
- (16) Select appropriate box. Refer to Classification and Pay Guide Section 400 for definitions of organization levels. "Mega" is defined as a department with over 17,000 employees.
- (17) Select size of department.

SECTION C. ORGANIZATIONAL LEVEL CONSIDERATIONS (continued)

- (18) Enter the current and proposed CEA level, if applicable. The CEA Level Guidelines worksheet outlines standard appropriate levels. Contact your Personnel Management Division consultant for guidance on proposed CEAs that do not fit these standards.

- (19) Select CEA position role. The CEA Level Guidelines worksheet defines the appropriate roles.

SECTION D. SUMMARY OF REQUEST

- (20) Explain duties and responsibilities of CEA.
- (21) Select appropriate box. Explain the degree to which the program is critical to the department's mission as a whole.
- (22) Select appropriate box to reflect cause of need for new or revised CEA position.
- (23) Summarize request and identify relevant considerations.
- For new CEAs, provide background information regarding why the position is being requested. (For example: reorganization, new mandate, etc.)
 - For revisions to existing CEA positions, explain what has changed (either major or minor changes).
 - For reactivating inactive CEA position, explain why position is being reactivated. Explain what has changed to necessitate the reactivation of the CEA position.
 - For level changes, explain what has changed to warrant an upgrade.
- (24) Select appropriate box. Enter classification, if applicable.
- (25) Explain impact to existing position if CEA is established, if applicable.

SECTION E. ROLE IN POLICY INFLUENCE

- (26-27) Principal Policy maker – Provide thorough and complete answers. Provide examples of the types of policies the position creates or implements. Describe extent of impact of the position's policy formulation and implementation role.
- (28-31) Select appropriate box(s).
- (32) Provide a thorough and complete answer. Identify the sensitivity of all controversial policy issues that will be handled by the position.
- (33-36) Describe the policy influencing role, why a CEA is necessary and any authority overlap with other high-level positions.
- (37-38) Describe the consequence of error of the CEA's role.

SECTION F. OTHER CONSIDERATIONS

- (39) Provide any other pertinent information. This section may be utilized for other considerations not identified above.

SECTION G. DEPARTMENT APPROVAL

Department analyst and personnel officer signatures.

HOW TO SUBMIT THE CEA POSITION REQUEST PACKAGE

The CEA Position Request package should be transmitted electronically by the departmental Personnel Officer to CalHR to: CEA@CalHR.ca.gov. To facilitate timely web posting in compliance with California Code of Regulations, title 2, Section 548.5, departments must save their proposal information to this fill-and-print form and submit that saved, unsigned version to CalHR electronically along with a signed copy. Do not attach additional pages.

FOR QUESTIONS CONTACT: Your department's assigned CalHR Analyst/Consultant, Personnel Management Division, (916) 324-9381, or CEA@CalHR.ca.gov.

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

1. Date

2024-01-17

2. Department

Department of Rehabilitation

3. Organizational Placement (Division/Branch/Office Name)

Director's Office

4. CEA Position Title

Chief Equity Officer

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

Under the general direction of the Chief Deputy Director, the Chief Equity Officer will serve as a member of the Department of Rehabilitation (DOR) Executive Leadership Team and will oversee all functions of the Inclusion, Diversity, Equity, & Accessibility (IDEA) Division. They will provide executive leadership for initiatives that foster a diverse workforce and advance inclusion, equity, and accessibility within DOR, and they will represent DOR in cross departmental efforts to advance equity, particularly for Californians with disabilities.

6. Reports to: (Class Title/Level)

Chief Deputy Director

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

- ☒ 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 ☐ 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.

The Chief Equity Officer will serve as a member of the Department of Rehabilitation (DOR) Executive Leadership Team and serve to advance diversity, equity, inclusion and accessibility (DEIA) through DOR programs and initiatives for Californians with disabilities. They will provide executive leadership in three key areas related to DEIA: internal facing DEIA efforts related to DOR's workforce, policies, and partnerships; external facing consultation and subject matter expertise for other state partners in furtherance of DEIA for Californians with disabilities; and applying a DEIA lens across DOR programs, including programmatic service delivery and outcomes.

The Chief Equity Officer will also oversee all functions within the Inclusion, Diversity, Equity, & Accessibility (IDEA) Division. In this role, they be responsible for leading a cross-disciplinary team, including the Office of Civil Rights (OCR), the Stakeholder Initiatives Office (SIO), the Workforce Diversity Specialist, and the Diversity and Inclusion Advisor as well as will serve as the Equal Employment Opportunity (EEO) Officer for DOR. This includes providing executive level leadership to OCR in carrying out DOR's EEO program, EEO complaint investigation and resolution, bilingual services program, and language access services. As the executive over SIO, they will supervise the SIO manager and indirectly supervise a team of SIO analysts and specialists in supporting research and innovation projects, such as the consumer satisfaction survey and the comprehensive statewide needs assessment to enhance DEIA for DOR stakeholders. They will also supervise the Workforce Diversity Specialist and the Diversity and Inclusion Advisor to foster diversity on the development and implementation of DOR's reasonable accommodations program, upward mobility program, employee recognition program, diversity recruitment efforts, and support of DOR staff diversity affinity groups.

In addition, they will serve as the executive level leader, expert, trainer, and consultant to DOR's Directorate and senior management on all matters related to DEIA, particularly for people with disabilities. This includes spearheading efforts and developing new initiatives to advance inclusion and accessibility throughout DOR and across the state for Californians with disabilities. In this capacity, they will provide thought partnership and support to other DOR executives, state partners, and other stakeholders on equity initiatives for Californians with disabilities. This may include representing DOR on public advisory bodies and subcommittees, meetings with leadership across the Administration, other state control agencies, county and city governments, community-based programs, and other private agencies related to the advancement of equity for Californians with disabilities.

B. SUMMARY OF REQUEST (continued)

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: The DOR is looked to by leadership across the Administration, external stakeholders, and federal partners as California's lead department on all matters related to the advancement of people with disabilities, including administration of the largest vocational rehabilitation and independent living programs in the nation. This position would support establishment of a centralized office and executive dedicated to inclusion, diversity, equity, and accessibility (DEIA) within DOR to carry out and apply an intersectional, social justice lens across all facets, internal and external, of DOR's core mission and enhance DOR's ability to serve as a resource to the rest of the state in serving Californians with disabilities. In addition, this proposal realigns existing DOR resources to achieve comparability and parity with the type and level of resources that other state entities have established for DEIA, which is all the more necessary for DOR, given that DOR's core mission and purpose is to advance DEIA for Californians with disabilities.

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.

Given the diversity of needs and intersecting, and often marginalized, identities within the disability community, there has always been a need for greater DEIA focus and resources to serve Californians with disabilities. What has changed is that this need is being acknowledged and amplified in and out of state government, and there are increasing calls to action for more targeted strategies to address these historical inequities. As such, DOR regularly and increasingly receives requests from top leadership across the state, federal, and legislative partners for guidance and thought partnership on DEIA issues impacting people with disabilities. In the absence of a DOR executive dedicated to DEIA, DOR finds itself either having to use existing staff who may not be at a level to engage as executive peers or having to redirect one of the existing executives to serve in the role on an ad hoc basis. Below are several specific and recent examples of recent instances that further justify the need for this resource.

- This proposal substantively and demonstrably aligns DOR with the Administration, which has consistently signaled to all state departments and the citizenry at large their prioritization of DEI efforts. This is reflected in the Governor's "California for All" campaign, the creation of the state's first Chief Equity Officer, and the signing of Executive Order N-16-22 that outlines a broad range of actions and initiatives to advance equity and social justice for historically marginalized communities.
- This proposal would directly support several areas outlined in EO N-16-22, including dedicating resources and expertise to equity initiatives, centralizing use of data to advance parity for marginalized communities, and accelerating actions that result in full inclusion and belonging for all Californians.
- This proposal would also align with and advance elements of the more recent EO N-11-23 on career and education, including achieving greater diversity, representation, and lived experience within the ranks of state civil service, and advancing access to career opportunities for more diverse communities, including people with disabilities, through reforms in education.
- The newly established Assembly Select Committee on barriers to employment for people with disabilities, at which DOR was called upon to testify in December 2023, is another very recent example of the public and legislative interest in expertise related to DEI for people with disabilities.

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 CEA will develop and implement policy with internal and external impact to DOR and influence policy and practice with internal and external impact for the state as a whole. Such policy areas may include the following:

- Creating strategies, recommendations, and policies for outreach and service to the +130,000 Californians with disabilities served by DOR programs that apply an intersectional lens to support parity in service and outcomes for historically marginalized subpopulations within the disability community, including black, indigenous, and other people of color (BIPOC) and lesbian, gay, bisexual, transgender, queer+ (LGBTQ+) Californians with disabilities.
- Engaging, consulting, and influencing DOR's federal oversight and funding agencies, including the Rehabilitation Services Administration and the Administration for Community Living, on the development of new program policies and initiatives related to intersectional equity outcomes for people with disabilities.
- Providing consultation, recommended policies, and best practices to other state departments and control agencies, including California Department of Human Resources and State Personnel Board, on inclusive hiring and recruitment practices to achieve equity goals for representation of people with disabilities in state civil service, including civil service leadership.
- Supporting DOR, California Health and Human Services Agency (CalHHS), and the Administration in responding to and providing technical assistance on inquiries or the development of proposals from the legislature and external advocacy groups related to DEI efforts and challenges as they relate to Californians with disabilities.

C. ROLE IN POLICY INFLUENCE (continued)

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

As described above, the Chief Equity Officer will oversee all functions of the IDEA Division, serve as DOR's Equal Employment Opportunity (EEO) Officer, and as the executive responsible for leading inclusion, diversity, equity, and accessibility initiatives for the department. They will oversee the Office of Civil Rights (OCR), the Stakeholder Initiatives Office (SIO), the Workforce Diversity Specialist, and the Diversity and Inclusion Advisor. This includes responsibility for the DOR EEO program, EEO complaint investigation and resolution, bilingual services program, and language access services. As the executive over SIO, they will supervise and provide executive leadership for research and innovation projects, such as the consumer satisfaction survey and the comprehensive statewide needs assessment to enhance DOR services to stakeholders. They will also supervise the Workforce Diversity Specialist and the Diversity and Inclusion Advisor to foster diversity on the development and implementation of DOR's reasonable accommodations program, upward mobility program, employee recognition program, diversity recruitment efforts, and support of DOR staff diversity affinity groups. In carrying out these functions, this executive will have both influence and direct decision making authority over a wide range of policies and initiatives that will impact the nearly 2,000 DOR staff and over 100,000 DOR service recipients, particularly those from historically marginalized communities.

In addition to the internal facing areas of authority described above, this executive will have external facing decision making authority in their capacity serving as the executive level leader, expert, trainer, and consultant to DOR's Directorate and to external partners on matters related to equity, particularly for people with disabilities. This includes spearheading efforts and developing new initiatives to advance inclusion and accessibility within DOR and across the state for Californians with disabilities. This may include representing DOR and having delegated authority to make decisions and speak on behalf of DOR on public advisory bodies and subcommittees, meetings with leadership across the Administration, other state agencies and governments partners, and community-based programs in relation to matters that serve the advancement of equity for Californians with disabilities.

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

This CEA position will develop and implement new policy and interpret and implement existing policy on behalf of DOR. They will support interpretation and implementation of a wide range of existing policies regarding equity, equal opportunity, fair employment practices, and outreach to underserved communities. They will also provide vision and executive leadership to teams responsible for gathering quantitative data from a broad range of sources and qualitative data, including from key stakeholders, that will inform the development and implementation of new policy, and possibly policy recommendations for the state as a whole, related to advancing equity, inclusion, and accessibility for Californians with disabilities.