

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

2026-03-06

2. Department

State Compensation Insurance Fund

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

Policy Operations

4. CEA Position Title

Executive Vice President of Policy and Safety & Health Services

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

This executive position holds full responsibility for the strategic business plans and policy of State Fund's Safety & Health, Policy Services, Premium Audit, and Billing functions. As a key member of the Executive Committee, the incumbent sets enterprise-wide policies, manages high-level operations, and drives strategic initiatives to ensure superior customer service and risk mitigation within California's workers' compensation landscape, thereby ensuring stable, high-quality workers' compensation coverage for California employers and injured workers.

6. Reports to: (Class Title/Level)

Chief Executive Officer

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.

Strategic Leadership & Policy Development –

- a. Develop, implement, and monitor high-level operational strategies and policies across Safety & Health, Service Center, Premium Audit, and Billing departments.
- b. Develop and implement comprehensive, multi-year business strategies that align with the CEO's vision, ensuring alignment between company goals and day-to-day operations.
- c. Bridge the gap between strategic planning and tactical execution by leading cross-functional teams to deliver on operational goals.
- d. Partner with the C-Suite to define key performance indicators (KPIs) and establish robust, data-driven reporting to track company progress.
- e. Strengthen organizational rigor by reviewing and improving operational processes to boost productivity, efficiency, and cost-effectiveness.
- f. Oversee strategic special projects, ensuring high-impact initiatives (such as potential auditing or call center improvements) are delivered on time and within budget.
- g. Proactively advise the CEO on operational bottlenecks, process enhancements, and strategic opportunities for scaling.

Safety, Health, & Loss Prevention Services - Direct the statewide safety and health services program, ensuring compliance with OSHA regulations. Develops initiatives to reduce workplace injuries, thereby controlling experience modifications and lowering employer premiums.

Premium Audit & Billing Operations - Oversee premium audit and billing operations to ensure accuracy, compliance with California regulatory requirements, and efficient revenue collection. Establish protocols for auditing insureds' payroll records and resolving complex billing disputes.

Service Center Operations - Direct the Service Center to deliver exceptional service to policyholders, brokers, and injured workers. Ensure high performance in communication, responsiveness, and service level agreements.

Administrative & Executive Management - Provide executive leadership to subordinate managers, makes hiring and training decisions, and manages the departmental budget. Represent the CEO at high-level meetings with regulators, industry stakeholders, and board members. Collaborate with executive leadership (Claims, Underwriting) to ensure seamless, cross-functional operations. Lead and mentor direct reports, fostering a culture of accountability and continuous improvement. (

Collaborate with other members of the Executive Committee in strategic policy decisions impacting all program areas of the State Fund's business and its workforce and stakeholders; evaluate and recommend effective actions/decisions/advice; provide input and support in planning; and develop goals, policies, and guidelines; and in evaluating results.

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: Based on the mission of the State Compensation Insurance Fund (State Fund) in California—to provide a permanent, fairly priced workers' compensation market, make workplaces safe, and restore injured workers—the position of leading the Safety & Health and Policy Services programs is not only directly related but critically essential to the organization's core purpose.

This role acts as a primary operational engine, transforming State Fund's strategic goals into actionable, compliant, and customer-focused outcomes.

Direct Relationship to Mission-

The responsibilities of this position map directly to the three pillars of State Fund's mission:

- Make Workplaces Safe (Safety & Health Programs): By directing Safety & Health functions, the incumbent directly acts on the mission to prevent injuries before they happen. This involves designing, implementing, and monitoring safety services, which helps policyholders create safer environments.
- Provide Fairly Priced Insurance (Policy Services & Billing): The role manages Policy Services, Service Centers, and Premium Audit. Ensuring accuracy in premium audit and billing is critical to maintaining financial integrity and providing "at cost" insurance, ensuring policyholders pay fair rates.
- Restore Injured Workers & Operational Excellence: By overseeing Service Center operations, this leader ensures that policyholders and injured workers receive prompt, effective service, directly supporting the restoration goal.

Statutory Compliance & Risk Management: As a, entity operating in the heavily regulated California workers' compensation landscape, this leader ensures that all operations adhere to state laws.

Criticality to the Mission-

This position is critical to the mission for several high-impact reasons:

- Executive Leadership and Strategy (Executive Committee): As a member of the Executive Committee, this leader shapes enterprise-wide policies and ensures that day-to-day operations are aligned with the CEO's vision. This guarantees that strategic intent is successfully executed in the field.
- Mitigating Risk and Controlling Costs: By proactively managing workplace safety (reducing injury frequency) and enforcing accurate audits (reducing fraudulent or incorrect premiums), the incumbent directly controls costs for both the employer and State Fund.
- Building Trust and Reliability: The responsibility for Service Center operations means this person manages the direct interaction with customers, which is essential for maintaining State Fund's reputation as the "gold standard" of carriers.
- Emergency Authority and Adaptability: Exercising delegated authority for urgent decisions allows the organization to respond swiftly to industry changes or crises, maintaining stability in the market.

In summary, the position is the linchpin between strategic policy and operational reality, directly ensuring that State Fund remains a self-supporting, stable, and safety-focused entity that fulfills its legal obligation to California employers and employees.

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.

With the retirement of our current Chief Operating Officer (COO), we are optimizing our leadership structure to better serve California employers and brokers. The Chief Executive Officer (CEO) is restructuring these critical functions—Safety & Health Services, Policy Service Center, Premium Audit, and Billing—under a new, strategic CEA reporting to the CEO. This ensures dedicated focus on building, executing, and optimizing strategies for these vital operations, while the new COO focuses on core business underwriting segments.

Recent California legislation significantly impacting workers' compensation includes SB 606 (strengthening Cal/OSHA enforcement and penalties for "egregious" violations) and SB 1350 (extending safety protections to domestic workers by July 2025). Additionally, new penalties targeting construction contractors misclassifying employees took effect in October 2025.

The Chief Executive Officer needs this executive to focus on following areas and ensure that State Fund complies with the law. They will implement strategic business plans that elevate our representative to act as trusted advisors, thus enhancing our position as the premier workers' compensation carrier in California.

1. Strategic Safety & Risk Management: Update risk engineering and safety consultation programs to address SB 606 compliance, focusing on high-risk industries and helping employers avoid "egregious violation" classifications.

2. Premium Audit & Premium Growth: Revamp auditing processes to account for the influx of newly classified workers (domestic, contract workers). Implement rigorous audit protocols for contractors to ensure proper classification and premium collection in light of new penalties.

3. Product Innovation & Regulatory Compliance: Develop specialized insurance products or services for newly covered domestic workers and ensure underwriting guidelines comply with evolving labor laws. Improve innovative platforms for more direct access to policy holders and State Fund.

4. Client Advocacy & Education: Position the carrier as a compliance partner by providing clients to educate them on grants available that ensure their business is compliant with new and current statutory requirements.

5. Data Analytics: Leverage data to identify employers with high-risk behaviors or potential misclassification issues, offering proactive risk consulting to prevent losses and audits.

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 Executive Vice President of Policy and Safety & Health Services would be the principle policy maker for the following areas:

Corporate Safety & Health Services Strategy:

- Policy Area: Defining the scope, type, and delivery method of safety, health, loss prevention, and industrial hygiene services offered to all policyholders.
- Statewide Impact: This will have a direct impact on reducing workplace injuries for tens of thousands of employers, thereby lowering the overall frequency and severity of workers' compensation claims across California.

Regulatory Compliance & Loss Prevention Policy:

- Policy Area: Ensuring all safety programs and operational procedures align with evolving California statutory requirements, including, but not limited to, Cal/OSHA standards.
- Statewide Impact: Mitigates risk for policyholders by ensuring compliance, preventing regulatory fines, and promoting a safer work environment for California's workforce.

Premium Audit & Billing Operations:

- Policy Area: Setting policies for the high-level operation of Premium Audit and Billing, including the methodologies for accurate premium calculation and risk assessment.
- Statewide Impact: Ensures financial accuracy and fairness for employers, which is crucial for maintaining a stable, competitive market for workers' compensation insurance in California.

C. ROLE IN POLICY INFLUENCE (continued)

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

This CEA is a high-level executive reporting directly to the CEO, with responsibility over vast, critical, and specialized areas of State Fund. Even with a Senior Vice Presidents (SVP) below them in the hierarchy, this leader's authority is characterized by setting strategy, rather than just implementing it.

Scope of Authority:

Functional Oversight: The leader has "full responsibility for all functions and activities" of the Safety & Health, Service Center, Premium Audit, and Billing Operations functions. They develop and implement multi-year business strategies that align with the CEO's vision. This includes ensuring statutory compliance with California's workers' compensation landscape and managing high-level operations for safety, auditing, and billing. As a member of the Executive Committee, the role directly advises the CEO on enterprise-wide policies. They are responsible for relationships with external stakeholders like Cal/OSHA and the National Institute for Occupational Safety and Health (NIOSH).

Nature of Decision-Making:

This is a "policy-making" and "policy-influencing" role rather than just a managerial one. They define the scope of services, products, and safety information available to the public and policyholders. This position holds authority for "urgent decisions" on behalf of the organization. The leader sets "standards of excellence and accountability" and monitors organizational performance against strategic goals. They are responsible for implementing business plans that ensure financial accuracy and risk mitigation.

This position remains ultimately responsible to the CEO for the performance of the subordinates and the functional areas.

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

This CEA position involves both developing and implementing new policy, and interpreting and implementing existing policy, acting as a high-level executive within the State Fund senior leadership team. The leader develops and implements comprehensive, multi-year business strategies that align with the CEO's vision for Safety & Health, Service Center, Premium Audit, and Billing operations. As a member of the Executive Committee, the incumbent directly sets enterprise-wide policies and provides strategic guidance on critical operations. They are expected to identify gaps and emerging needs, translating legislative mandates into actionable, new internal policies to achieve goals like superior customer service and financial accuracy.

The CEA leader ensures that all operational policies and business plans adhere to California's workers' compensation laws and regulations and manages the day-to-day operations for Safety & Health, Service Center, Premium Audit, and Billing, applying established organizational policy to these functions. They exercise delegated authority for urgent decisions, which requires interpreting existing frameworks to resolve immediate, high-level issues.

The position is a "chief policy-maker" within its program area, focusing on both the creation of new strategies and the interpretation of high-level mandates (laws, regulations) to ensure operational compliance and performance.