STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 06/2019)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Research Data Analyst I	IT/PBMD/Division Office/Technology Business Management	
WORKING TITLE	**POSITION NUMBER** 900-170-5729-001	**EFFECTIVE DATE** 10/01/2020

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT: (PROVIDE A BRIEF SUMMARY OF THE MAIN PURPOSE AND FUNCTIONS OF THE POSITION. DESCRIBE THE SUPERVISORY RELATIONSHIPS INCLUDING THE CLASSIFICATION OF THE SUPERVISOR OR MANAGER TO WHOM THE INCUMBENT REPORTS. WHEN APPROPRIATE, IDENTIFY THE NEED FOR ANY CREDENTIAL OR LICENSE SUCH AS A DRIVER'S LICENSE.) *RED TEXT ONLY APPEARS ON THE SCREEN*

Under the direction of the Project and Business Management Division Chief, CEA B, the incumbent supports the data gathering, data analysis, data validation and data import/export within the enterprise Technology Business Management (TBM) application. The incumbent will help develop and interpret reports/dashboards to meet business user requirements and will assist in the maturation and expansion of the enterprise application, known as the Transparency and Financial Management (TAFM) tool. The incumbent will assist in the resolution of complex system problems relating to configuration, data quality and system enhancements. The incumbent should possess strong analytical skills, with an emphasis on the ability to think strategically, establish goals and priorities to meet tight time frames, and be capable of building collaborative relationships with internal and external stakeholders.

CORE COMPETENCIES: CLICK ON THE "VIEW COMPETENCIES" BUTTON TO SELECT CORE COMPETENCIES, GOALS, AND VALUES. AFTER SELECTIONS HAVE BEEN MADE, THEY WILL BE MERGED INTO THIS SECTION.

[View Competencies]

As a Research Data Analyst I, the incumbent is expected to develop the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, and Goals.

- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (System Performance - Commitment, Innovation)

- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (System Performance - Commitment, Innovation)

- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Organizational Excellence - Commitment, Teamwork)

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (System Performance - Commitment, Innovation)

- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (System Performance - Commitment)

- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Organizational Excellence - Commitment, Teamwork)

- **Technical Expertise:** Depth of knowledge and skill in a technical area. (System Performance - Commitment)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)[1]

Job Description (PROVIDE A DESCRIPTION OF DUTIES. RELATED DUTIES MAY BE GROUPED TOGETHER. TO ADD ADDITIONAL LINES OF DUTIES WITH DIFFERENT PERCENTAGES, CLICK ON THE "+" BUTTON.) *RED TEXT ONLY APPEARS ON THE SCREEN*

35%	E	Participate in the ongoing development and maturation of the Technology Business Model (TBM) for Caltrans IT. Assist in the gathering of functional and business requirements and translate information into a working set of operational and financial models, dashboards, and management reports. Collaborate with IT executives, management, and IT resource Management on IT financial metrics, and cost transparency initiatives. Elevate and help resolve problems related to configuration, data quality, and system enhancements. Participate in efforts to develop and mature data sources, report accuracy, and ensure adaptability to changing business needs. Contribute to the alignment of report development processes and technologies with IT and business strategies; report results to managers and stakeholders, as necessary. Support the TBM administrator in performing functions including, model configuration, data gathering, trouble-shooting and ongoing development of the enterprise TBM office and reporting tool. Provide training on the use and administration of the TBM enterprise tool as required.	+ −
20%	E	Work closely with managers, executives, and other IT staff, one on one or in groups, to identify requirements and develop dashboards and reports using multiple data sources. Create processes and technologies for management that are necessary to plan, build, manage and execute automated reports and dashboards for display via the TBM application allowing drill through capability to detailed data. Assist in the development, review, and execution of standards to ensure processes are repeatable and data is being pushed or pulled accurately and efficiently. Analyze output from TBM application and communicate results to relevant parties. Identify use-cases, data, and process improvement opportunities.	+ −
20%	E	Collaborate with IT staff to identify, document and implement the automation of data source exchanges through the development of Application Programming Interfaces (API) or other methods. Expand capabilities and mature enterprise tools by recommending use cases to leverage Software as a Service (SaaS) products and create efficiencies in business processes.	+ −
20%	E	Prepare presentations, emails to staff, update the TBM website, administer Reporting Code updates and manage the TBM mailbox etc. Interface with the IT Resource Management Unit (IT RM) regularly to ensure alignment with financial records, projections and collaboration on automation opportunities within the TAFM model. Collaborate with IT executives, management, and IT RM on IT financial metrics, and cost transparency initiatives.	+ −
5%	M	Provide consistent, efficient services to customers by using repeatable standardized processes, staff knowledge, and expertise. Continue self-improvement by developing skills through training and individual research.	+ −

[1]ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
 MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
The incumbent has no direct supervisory responsibilities.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Knowledge of: Data analysis methods and techniques including gathering and collection of structured and unstructured data, as well as general principles, concepts and terminology used in research; planning studies and investigations; trend analysis procedures; time management techniques to provide for efficient prioritization and completion of projects and assignments; software to prepare spreadsheet summaries, reports, charts, and tables; basic arithmetic and statistical techniques to analyze numerical data; and departmental policies and procedures.

Ability to: Research, gather, compile, and analyze structured and unstructured data; conduct and interpret descriptive statistical analyses using appropriate software to test research hypotheses and to formulate conclusions and recommendations; prepare research and statistical reports; analyze written and numerical data regarding general governmental problems; speak and write effectively; develop and evaluate alternatives, recommendations, solutions, and conclusions or approaches to research problems; manage a workload consisting of multiple projects and assignments; complete work under critical timelines to meet project. objectives and deadlines; be objective and flexible to adapt to changes in priorities and work assignments; and gain and maintain the confidence and cooperation of others, collaborate, and work in multidisciplinary teams.
Perform effectively in a fast-paced environment.

Use the Micorsoft Excel, Visio, Project, Microsoft Office Applications, Apptio, Tableau

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Incumbents are responsible for individual decisions and actions. Poor decisions or recommendations could result in significant losses of departmental efficiencies through unnecessary delays, loss of data, equipment damage, loss of employee productivity and possible user

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dissatisfaction.

PUBLIC AND INTERNAL CONTACTS
Daily contact is made with a wide range of users to provide technical information and solve problems. Contact occurs with other IT staff throughout the organization, vendors, and external entities. The nature of these contacts is not routine as the purpose and extent of each contact is different. Contact is made to plan, coordinate, and advise on work efforts which resolve operating problems. Contact is sometimes made to influence and motivate individuals working cooperatively toward mutual goals.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
The incumbent may be required to sit for prolonged periods of time using a keyboard, monitor, mouse, and telephone. The incumbent must value cultural diversity and other individual differences in the workforce; adjust rapidly to new situations warranting attention and resolution; be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles; consider and respond appropriately to the needs, feelings, and capabilities of others; be tactful and treat others with respect. In addition, the incumbent must have the ability to multi-task, adapt quickly to changing priorities, and perform completed staff work or tasks and projects with short notice.

WORK ENVIRONMENT
The incumbent will perform work indoors in a climate-controlled area under artificial lighting, using a personal computer in a cubicle environment or while teleworking. Employee may be required to travel to attend or conduct training.
Some weekend or after hours work may be required.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE