

## State of California - Department of Social Services

**DUTY STATEMENT**

EMPLOYEE NAME:

CLASSIFICATION:

Research Data Analyst I

POSITION NUMBER:

800-674-5729-910

DIVISION/BRANCH/REGION: (UNDERLINE ALL THAT APPLY)

Admin Division, Fiscal Forecasting and Policy Branch

BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY)

Fiscal Policy &amp; Analysis Bureau/Allocations

SUPERVISOR'S NAME:

Charles Jennings

SUPERVISOR'S CLASS:

SSM I

SPECIAL REQUIREMENTS OF POSITION (CHECK ALL THAT APPLY):

Designated under Conflict of Interest Code.

Duties require participation in the DMV Pull Notice Program.

Requires repetitive movement of heavy objects.

Performs other duties requiring high physical demand. (Explain below)

 None

Other (Explain below)

I certify that this duty statement represents an accurate description of the essential functions of this position.

I have read this duty statement and agree that it represents the duties I am assigned.

SUPERVISOR'S SIGNATURE

*Charles Jennings*

DATE

6/8/2021

EMPLOYEE'S SIGNATURE

DATE

**SUPERVISION EXERCISED** (Check one): None

Supervisor

Lead Person

Team Leader

**FOR SUPERVISORY POSITIONS ONLY:** Indicate the number of positions by classification that this position DIRECTLY supervises.

Total number of positions for which this position is responsible:

**FOR LEADPERSONS OR TEAM LEADERS ONLY:** Indicate the number of positions by classification that this position LEADS.

The RDA I functions as lead to the other analysts in the unit, which include the Staff Services Analyst, Associate Governmental Program Analyst, and RDA classifications. The RDA I may also be assigned to serve as lead on team projects with other analysts in the Bureau and Branch. The RDA I is called upon to act in the absence of his/

MISSION OF ORGANIZATIONAL UNIT:

The Fiscal Forecasting and Policy Branch (FFPB) is comprised of four bureaus: Children and Adult Programs Estimates Bureau, CalWORKs and CalFresh Estimates Bureau, Research Bureau, and Fiscal Policy and Analysis Bureau. The Branch plays a key role in developing fiscal policy, working with the Department's core programs to develop the Local Assistance Budget, distributing funds to the counties, and completing the research and data analysis required for sound decision-making.

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**CONCEPT OF POSITION:**

Under general direction of the Staff Services Manager (SSM I) the RDA I will assist in the development of data driven projection and allocation methodologies using various data sources and will provide recommendations for improving current processes and procedures for data analysis and fund allocation. The RDA I will use a variety of analytical tools and techniques to provide technical assistance and analysis of related demographic and expenditure data, to assist in the identification of shifts and trends by analyzing and interpreting available data. The RDA I must be able to reason logically and creatively.

**A. RESPONSIBILITIES OF POSITION:**

The responsibilities of the RDA I include maintaining and improving existing forecasting and allocation assignments, developing new forecasts and allocation methodologies, researching the availability, reliability and applicability of data/information, and conducting, developing and presenting ad-hoc data and policy analysis on a variety of fiscal topics. The RDA I serves as a liaison with CDSS program staff and may be required to present expenditure and caseload information, and defend completed analysis to State, Federal and County executives, the Department of Finance (DOF), and the Legislative Analyst's Office.

40% Utilizing structured and unstructured data from various reports and resources, assists in researching, analyzing, and interpreting expenditure and caseload data for the purpose of continuously improving existing caseload and expenditure projections and fund allocation methodologies. Performs scheduled report maintenance and assists in the compilation and analysis of expenditure and caseload trends over time. Using Microsoft Excel and other visual analytic tools, presents trend and regression analysis and proposed options for improving allocation methodologies and expenditure projections. Draft County Fiscal Letters detailing allocation methodology and critical fiscal information.

30% Assists in the development of new caseload projections, fund allocation methodologies, and fiscal policies. Conducts basic research and data gathering to inform decision makers regarding potential statewide costs associated with new and significantly changed policies and options for the distribution of funds to counties or other entities. Assists in developing the necessary tools for data collection using research and data analysis methods. This includes but is not limited to the development of data models, performance evaluation reports, visual aids, and routine dashboards.

25% Under direction of the SSM I, assists in researching, analyzing, and interpreting data and fiscal policy to respond to a variety of questions and hypothetical scenarios posed by State and County personnel and other stakeholders. Reviews and analyzes legislation, regulations, and policy initiatives. This includes, researching the availability of relevant data, and assessing the appropriateness of application to fiscal analyses. The RDA I assists in developing recommendations based on all the findings, and presenting to management, legislative staff, advocates and other stakeholders.

5% Performs other duties as needed pertaining to the Branch.

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B. SUPERVISION RECEIVED:

The RDA I receives general supervision from a Staff Services Manager I and is expected to work independently in the development and application of data analytics, research methodology and visualization techniques.

C. ADMINISTRATIVE RESPONSIBILITY:

None.

D. PERSONAL CONTACTS:

The RDA I meets with the Fiscal Forecasting and Policy Branch Chief and Bureau Chiefs, as well as other departmental managers and program partners. The RDA I may interface with county fiscal representatives as well as control agencies such as the Department of Finance, Health and Human Services Agency, as well as the Legislature, stakeholders, etc.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analysis and supporting information used to forecast and allocate departmental funds and monitor county expenditures of approximately \$30 billion annually. Failure to provide accurate research and data findings may negatively affect the provision of information needed to appropriately support state programs, which may negatively affect the provision of services to needy and vulnerable clients and could also result in inappropriate over-allocation of state funding.

F. OTHER INFORMATION:

The work created by this Branch is confidential in nature until it has been published. As such, it is essential that the RA I maintain a high degree of integrity and maintain departmental confidentiality.

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**DUTY STATEMENT**

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CLASSIFICATION:

Research Data Analyst II

POSITION NUMBER:

800-674-5731-910

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Admin Division, Fiscal Forecasting and Policy Branch

BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY)

Fiscal Policy &amp; Analysis Bureau/Allocations

SUPERVISOR'S NAME:

Charles Jennings

SUPERVISOR'S CLASS:

SSM I

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SUPERVISOR'S SIGNATURE

*Charles Jennings*

DATE

6/8/2021

EMPLOYEE'S SIGNATURE

DATE

**SUPERVISION EXERCISED** (Check one):

None

Supervisor

 Lead Person Team Leader**FOR SUPERVISORY POSITIONS ONLY:** Indicate the number of positions by classification that this position DIRECTLY supervises.

Total number of positions for which this position is responsible:

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The RDA II may act as lead to the other analysts in the unit, which include the Staff Services Analyst, Associate Governmental Program Analyst, and RDA I classifications. The RDA II may also be assigned to serve as lead on team projects with other analysts in the Bureau and Branch. The RDA II may lead in the absence of the SSM I.

MISSION OF ORGANIZATIONAL UNIT:

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**CONCEPT OF POSITION:**

Under general direction of the SSM I, the RDA II is responsible for the development of data driven projection and allocation methodologies using various Departmental data sources and providing recommendations for improving current processes and procedures for data analysis and fund allocation. The RDA II will use a variety of analytical tools and techniques to provide technical assistance and analysis of related caseload and expenditure data, to assist in the identification of shifts and trends by analyzing and interpreting available data. The RDA II must be able to reason logically and creatively.

**A. RESPONSIBILITIES OF POSITION:**

The responsibilities of the RDA II include maintaining and improving existing forecasting and allocation assignments, developing new forecasts and allocation methodologies, researching the availability, reliability and applicability of data/information, and conducting, developing and presenting ad-hoc data and policy analysis on a variety of fiscal topics. The RDA II serves as a liaison with CDSS program staff and will be required to present expenditure and caseload information, and defend completed analysis to State, Federal and County executives, the Department of Finance (DOF), and the Legislative Analyst's Office.

40% Utilizing structured and unstructured data from various reports and resources, is responsible for researching, analyzing, and interpreting expenditure and caseload data for the purpose of continuously improving existing caseload and expenditure projections and fund allocation methodologies. Performs scheduled report maintenance and assists in the compilation and analysis of expenditure and caseload trends over time. Using Microsoft Excel and other visual analytic tools, presents trend and regression analysis and proposed options for improving allocation methodologies and expenditure projections. Draft County Fiscal Letters detailing allocation methodology and critical fiscal information.

30% Develops new caseload projections, fund allocation methodologies, and fiscal policies. Conducts in-depth research, and data gathering to inform decision makers regarding potential statewide costs associated with new and significantly changed policies and options for the distribution of funds to counties or other entities. Responsible for developing the necessary tools for data collection using research and data analysis methods. This includes but is not limited to the development of data models, performance evaluation reports, visual aids, and dashboards.

25% Responsible for researching, analyzing, and interpreting data and fiscal policy to respond to a variety of questions and hypothetical scenarios posed by State and County personnel and other stakeholders. Reviews and analyzes legislation, regulations, and policy initiatives. This includes, researching the availability of relevant data, and assessing the appropriateness of application to fiscal analyses. The RDA II develops recommendations based on all the findings, and presenting to management, legislative staff, advocates and other stakeholders.

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None.

D. PERSONAL CONTACTS:

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