

State of California - Department of Social Services

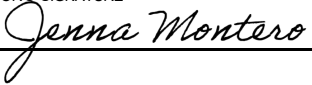
DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION: Research Data Analyst I (RDA I)	POSITION NUMBER: 800-676-5729-701
DIVISION/BRANCH/REGION: (UNDERLINE ALL THAT APPLY) Finance & Accounting / Fiscal Forecasting Branch	BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY) FE&E Estimates Bureau/ Research Unit
SUPERVISOR'S NAME: Jenna Montero	SUPERVISOR'S CLASS: Supervisor 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 	DATE 4/8/26	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.

MISSION OF ORGANIZATIONAL UNIT:

The Fiscal Forecasting Branch Estimates Bureaus develop the annual Governor's Budget and May Revision update for Department's Local Assistance programs, which are administered by County Welfare Departments, Probation Departments, and contracted entities. In addition, the bureaus are responsible for providing fiscal analysis of proposed legislation to determine if there is a fiscal impact to the Department's programs.

CONCEPT OF POSITION:

Under the general supervision of a Supervisor II, the RDA I is responsible for the conceptualization and development of complex estimating methodologies and performing research and data analysis for the Department's programs. The RDA I works in a collaborative environment with multi-disciplinary teams to develop fiscal analysis and proposals for informing major budget and policy decisions and programmatic reforms. The RDA I shall develop an understanding of welfare programs, policies, and experience in interpreting and applying statutes, regulations, and procedures. The RDA I will use statistical and other quantitative techniques to independently create and apply research study methods, data analytics and visualizations, and modeling to determine fiscal analysis and caseload impacts. This includes compiling, analyzing, and interpreting both structured and unstructured data from existing reports and resources to develop cost estimates that display the effect of policy changes and proposals on the Department's local assistance Programs. The RDA I is responsible for providing technical assistance and guidance in the trend analysis of related caseload and expenditure data to determine cost and caseload impacts over time utilizing, both internal and external data collection systems or reports available to the Department. The RDA I must be able to reason logically and creatively to independently analyze data, develop new estimate methodologies and assumptions, present the findings, and is expected to use a variety of analytical techniques to provide necessary strategies, solutions, and consultation.

The RDA I is also expected to possess strong writing and presentation skills.

A. RESPONSIBILITIES OF POSITION:**Essential Functions:**

- 40% Under the general supervision of a Supervisor II, the RDA I plans, creates, and develops data analysis and study approaches, applies research methodologies, interprets findings to provide varied and complex fiscal and caseload data analysis, projections, and calculation of impacts related to assigned program areas. This includes developing structured written reports and estimate methodologies, applying research methods, analyzing program assumptions, and assessing economic, demographic and social variables. Utilize intermediate statistical techniques and models to develop cost and caseload forecasts and trends, develop assumptions for program activities and use to project and estimate future economic and program growth or decline. This includes but is not limited to routine dashboards, performance evaluation reports, visual aids, and data models. The RDA I confers with program and research staff and presents recommendations to upper management and outside control agencies to inform policy and decision-making for the Governor's Budget, the May Revision, as well as state and federal legislation.
- 20% Under the general supervision of a Supervisor II, the RDA I uses analytical skills and expertise to describe data patterns, project impacts, make comparisons, and explore the broader impacts of policy implications on special projects related to the assigned program areas. The RDA I is expected to use multiple data sources such as Departmental automation systems, data from other states, other governmental agencies such as DOF, independent researchers, Universities, counties, federal government, and population statistics and census data. The RDA I is responsible for using the various data sources to complete ad-hoc forecasts and reports, extract information and conceptualize analyses relating to program policy issues. The RDA I is expected to develop and validate assumptions, analyze the associated fiscal and caseload impacts, prepare written reports of the findings, and present the analysis to management, executive leadership, as well as internal and external stakeholders.
- 20% Under the general supervision of a Supervisor II, the RDA I monitors caseload and expenditure trends to track program implementation and oversight, caseload characteristics, demographics, and cost effectiveness. Ensure the integrity of all estimating procedures by developing data sets, conducting data analysis on existing estimate methodologies, and recommending modifications for more accurate data information systems, sources and studies designed to measure the fiscal and caseload impacts of program policy changes. This includes determining if there is adequate historical data to determine potential trends that will support the Department's position or gathers new data if needed. Identifies new innovative visualization techniques to access and display data to better inform others.
- 10% Under the general supervision of a Supervisor II, the RDA I prepare and/or review County Fiscal Letters, All County Letters, All County Information Notices, and regulation packages. Review program-related reports and reports from other entities that pertain to the RDA I program assignments.

Marginal Functions:

5% Assist Estimates analysts and develops training materials for Branch and Department-wide trainings. Participates on workgroups for identifying and implementing process improvements and initiatives.

5% Performs other duties as assigned that pertain to the Fiscal Forecasting Branch and public service.

B. SUPERVISION RECEIVED:

The RDA I receives direction from a Supervisor II, and is expected to act with high degree of independence in the development and application of data analytics, research methodologies and visualization techniques in addition to the development of fiscal forecasting models and techniques.

C. ADMINISTRATIVE RESPONSIBILITY:

None.

D. PERSONAL CONTACTS:

The RDA I meets with the Fiscal Forecasting Branch Chief and Bureau Chiefs, as well as other departmental managers when designing varied and complex research and data analysis and developing estimates for programs. The RDA I interacts with control agencies such as the Department of Finance and Health and Human Services Agency, as well as the Legislature, the Legislative Analyst Office, and other stakeholders, such as the County Welfare Directors Association, Chief Probation Officers of California, and the advocate community. The RDA I serves as a team lead, working closely with Analysts I and II in the Estimates Bureaus on various projects and fiscal analyses.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analysis and supporting information used to prepare the local assistance budget which exceeds \$29 billion annually. Failure to exercise good judgment and integrity either in developing or defending estimates could adversely affect the Department's ability to properly budget the costs of its programs.

F. OTHER INFORMATION:

The RDA I is expected to have good qualitative analysis capabilities and work in a team setting and/or lead capacity. The incumbent is expected to be familiar with quantitative and qualitative data-driven research and statistical and forecasting techniques and the utilization of computer resources in the application of these techniques. The RDA I is also expected to possess strong oral and written communication skills.

The estimates prepared by the Fiscal Forecasting Branch are the foundation for the Governor's Budget and processing legislation and are therefore subject to legislative schedules and time frames. To meet these deadlines, there are times throughout the year when mandatory overtime becomes a requirement for analysts in the branch. All estimates and work created by this Branch is confidential in nature until it has been published.

State of California - Department of Social Services

DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION:

Research Data Analyst II (RDA II)

POSITION NUMBER:

800-676-5731-701

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

Finance & Accounting / Fiscal Forecasting Branch

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

FE&E Estimates Bureau/ Research Unit

SUPERVISOR'S NAME:

Jenna Montero

SUPERVISOR'S CLASS:

Supervisor II

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*)
- X 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

Jenna Montero

DATE

4/8/26

EMPLOYEE'S SIGNATURE

DATE

SUPERVISION EXERCISED (Check one):

- None Supervisor X 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 II functions as lead to the other analysts in the unit, which include the Research Data Specialist I and Research Data Specialist II 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 is called upon to act in the absence of his/her supervisor and provide expert consultative services on the feasibility, impact, or potential impact on a variety of policy changes, projects or proposals to interested parties. The RDA II acts as a liaison with CDSS program staff and may be required to present and defend projections and estimates to oversight agencies, such as the Department of Finance, as well as external stakeholders, including the Legislative Analyst Office and legislative consultants. In addition, the RDA II represents the Branch on multi-disciplinary teams and trains other Branch staff on quantitative forecasting methods.

MISSION OF ORGANIZATIONAL UNIT:

The Fiscal Forecasting Branch Estimates Bureaus develop the annual Governor's Budget and May Revision update for Department's Local Assistance programs, which are administered by County Welfare Departments, Probation Departments, and contracted entities. In addition, the bureaus are responsible for providing fiscal analysis of proposed legislation to determine if there is a fiscal impact to the Department's programs.

CONCEPT OF POSITION:

The RDA II is independently responsible for the conceptualization and development of complex estimating methodologies and performing research and data analysis for the Department's programs. The RDA II is the senior level analyst and works in a collaborative environment with multi-disciplinary teams to develop fiscal analysis and proposals for informing major budget and policy decisions and programmatic reforms. The RDA II shall develop a deep understanding of welfare programs, policies, and experience in interpreting and applying statutes, regulations, and procedures. The RDA II will use more complex statistical and other quantitative techniques to independently create and apply research study methods, data analytics and visualizations, and modeling to determine fiscal analysis and caseload impacts. This includes compiling, analyzing, and interpreting both structured and unstructured data from existing reports and resources to develop cost estimates that display the effect of policy changes and proposals on the Department's local assistance Programs. The RDA II is responsible for providing technical assistance and guidance in the trend analysis of related caseload and expenditure data to determine cost and caseload impacts over time utilizing, both internal and external data collection systems or reports available to the Department. The RDA II must be able to reason logically and creatively to independently analyze data, develop new estimate methodologies and assumptions, present the findings, and is expected to use a variety of analytical techniques to provide necessary strategies, solutions, and consultation. The RDA II is also expected to possess strong writing and presentation skills.

A. RESPONSIBILITIES OF POSITION:**Essential Functions:**

- 40% Independently plans, creates, and develops more complex data analysis and study approaches, applies research methodologies, interprets findings to provide varied and complex fiscal and caseload data analysis, projections, and calculation of impacts related to assigned program areas. This includes developing structured written reports and estimate methodologies, applying research methods, analyzing program assumptions, and assessing economic, demographic and social variables. Utilize intermediate statistical techniques and models to develop cost and caseload forecasts and trends, develop assumptions for program activities and use to project and estimate future economic and program growth or decline. This includes but is not limited to routine dashboards, performance evaluation reports, visual aids, and data models. The RDA II confers with program and research staff, and presents recommendations to upper management and outside control agencies to inform policy and decision-making for the Governor's Budget, the May Revision, as well as state and federal legislation.
- 20% Uses analytical skills and expertise to describe data patterns, project impacts, make comparisons, and explore the broader impacts of policy implications on special projects related to the assigned program areas. The RDA II is expected to use multiple data sources such as Departmental automation systems, data from other states, other governmental agencies such as DOF, independent researchers, Universities, counties, federal government; and population statistics and census data. The RDA II is responsible for using the various data sources to complete ad-hoc forecasts and reports, extract information and conceptualize analyses relating to program policy issues. The RDA II is expected to develop and validate assumptions, analyze the associated fiscal and caseload impacts, prepare written reports of the findings, and present the analysis to management, executive leadership, as well as internal and external stakeholders.
- 20% Closely monitors caseload and expenditure trends to track program implementation and oversight, caseload characteristics, demographics, and cost effectiveness. Ensure the integrity of all estimating procedures by developing data sets, conducting data analysis on existing estimate methodologies, and recommending modifications for more accurate data information systems, sources and studies designed to measure the fiscal and caseload impacts of program policy changes. This includes determining if there is adequate historical data to determine potential trends that will support the Department's position or gathers new data if needed. Identifies new innovative visualization techniques to access and display data to better inform others.
- 10% Prepare and/or review County Fiscal Letters, All County Letters, All County Information Notices, and regulation packages. Review program-related reports and reports from other entities that pertain to the RDA II program assignments.

Marginal Functions:

- 5% Leads and mentors Estimates analysts and develops training materials for Branch and Department-wide trainings. Lead workgroups for identifying and implementing process improvements and initiatives.
- 5% Performs other duties as assigned that pertain to the Fiscal Forecasting Branch and public service.

B. SUPERVISION RECEIVED:

The RDA II receives direction from a Supervisor II, and is expected to act with high degree of independence in the development and application of data analytics, research methodologies and visualization techniques in addition to the development of fiscal forecasting models and techniques.

C. ADMINISTRATIVE RESPONSIBILITY:

None.

D. PERSONAL CONTACTS:

The RDA II meets with the Fiscal Forecasting Branch Chief and Bureau Chiefs, as well as other departmental managers when designing varied and complex research and data analysis and developing estimates for programs. The RDA II interacts with control agencies such as the Department of Finance and Health and Human Services Agency, as well as the Legislature, the Legislative Analyst Office, and other stakeholders, such as the County Welfare Directors Association, Chief Probation Officers of California, and the advocate community. The RDA II serves as a team lead, working closely with Analysts I and II in the Estimates Bureaus on various projects and fiscal analyses.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analysis and supporting information used to prepare the local assistance budget which exceeds \$29 billion annually. Failure to exercise good judgment and integrity either in developing or defending estimates could adversely affect the Department's ability to properly budget the costs of its programs.

F. OTHER INFORMATION:

The RDA II is expected to have good qualitative analysis capabilities and work in a team setting and/or lead capacity. The incumbent is expected to be familiar with quantitative and qualitative data-driven research and statistical and forecasting techniques and the utilization of computer resources in the application of these techniques. The RDA II is also expected to possess strong oral and written communication skills.

The estimates prepared by the Fiscal Forecasting Branch are the foundation for the Governor's Budget and processing legislation and are therefore subject to legislative schedules and time frames. To meet these deadlines, there are times throughout the year when mandatory overtime becomes a requirement for analysts in the branch. All estimates and work created by this Branch is confidential in nature until it has been published.