

**ESSENTIAL FUNCTIONS DUTY STATEMENT**

HRM-025

|                                                                     |                                                                                                              |
|---------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <b>Classification Title:</b><br>Research Data Specialist I          | <b>Branch/Division/Bureau:</b><br>Climate and Sustainability Branch / Data Analytics and Reporting Division  |
| <b>Working Title:</b><br>Data Analytics & Reporting Project Manager | <b>Office/Unit/Section/Geographic Location:</b><br>Los Angeles                                               |
| <b>Position Number (13 Digit):</b><br>413-318-5742-006              | <b>Conflict of Interest Position:</b><br><input checked="" type="checkbox"/> NO <input type="checkbox"/> YES |
| <b>Employee Name:</b>                                               | <b>Effective Date:</b>                                                                                       |

**BASIC FUNCTION:**

Under the general direction of the Data Analytics and Reporting (DAR) Division Chief and Supervisor, the Research Data Specialist I (RDS I) is responsible for independently planning, organizing, and conducting complicated studies pertaining to all mandated research projects and special executive assignments. The RDS I will be assigned to serve as the senior analyst on insurance related research projects and assignments for the Data Analytics and Reporting Division.

The RDS I will be required to effectively use multi-tasking techniques, problem solving skills, team building skills, communication skills, and strong organization/planning techniques in a highly complex environment requiring his/her attention on several concurrent projects with multiple deadlines. The RDS I will be required to develop, compile and produce the master data and report tables, and all materials related to the mandated requirements. This may require the innovative and/or original development of complex data reports, validation tools, and templates. The RDS I will be responsible for establishing support systems for tracking company submissions; assist staff with responses to the more complex and difficult technical questions pertaining to a research project; work with staff to ensure the timely collection of all company filings mandated by California Insurance Code and/or California Code of Regulations; review/validate master tables; and develop consolidated report tables to close-out a project. The RDS I will be required to develop and complete data validation tests that ensure data quality. The RDS I will also be required to develop final reports, tables, and related data queries that ensure the project has been closed and is ready for release.

Occasional travel may be required within the state of California via private or public transportation (i.e., automobile, airplane, etc.).

**ESSENTIAL FUNCTIONS:**

- 25% Research and Analytics – Serve as the lead senior analyst responsible for addressing highly complex and technical research issues and projects required by code or assigned by Executive Staff. This involves communication with external stakeholders (e.g. – other local, state, and Federal entities), internal CDI stakeholders, and DAR Chief, Supervisor and other Senior Research staff to coordinate research efforts, developing the data analysis, validation tools, and completing all reports and tables. The RDS I will be called upon to develop ad-hoc queries and tables related to existing or newly mandated research projects and to improve existing research tools and methods to address changes in the reporting and collection of data by CDI licensees.
- 20% Data Validation and Master Table Development – Review and validate master tables. Develop data validation tests to ensure a high degree of data quality for all project tables and related reporting materials. The RDS I will be responsible for the collection, validation, and development of master project tables that will be used to complete mandated reports and studies. The RDS I will be required to work with Chief, Supervisor, and other Senior Research Staff to create validation reports and tools. The RDS I will be required to use CDI approved software such as: MS-Excel, MS-Word, MS-Access, Oracle or Snowflake SQL coding, Microsoft Office add-ons, and TOAD or equivalent.
- 15% Report Development and Project Closure - Develop final reports and tables that ensure the project has been closed and is ready for release. This involves communication with DAR Chief, Supervisor, and other Senior Research staff to complete final master tables and related report materials. The RDS I will be called upon to develop reports and tables on ad-hoc assignments made by DAR Chief and Supervisor related to existing or newly mandated research projects.
- 15% Data Quality Reviews – Periodically review a sample of closed files from each team analyst to ensure that established procedures and protocols were followed and to address any missing items, explanation, and errors in the original or resubmitted filing.
- 10% Training and development of DAR team leads and staff analysts on data validation issues, and table and report development.
- 10% Maintain adequate documentation and backups for each project to include user and technical manuals, algorithms, and methodologies. Prioritize projects and tasks and projects time frames for completion. Stay abreast of all laws, rules, and regulations necessary to successfully perform the duties and responsibilities of the position.

**MARGINAL FUNCTIONS:**

5% Provide backup support to other units and other duties as assigned.

**WORK ENVIRONMENT OR PHYSICAL ABILITIES:**

- Incumbent must be able to work in a high-rise building.
- Frequent sitting and use of computer/office equipment required.
- Move up to 25lbs. for meeting set-up and delivery of office supplies.
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed, however other authorized transit subsidies do exist for those who qualify.

**I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation.** (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

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

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name