

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Research Data Analyst II	OFFICE/BRANCH/SECTION HQ / Division of Budgets / Monitoring and Management	
WORKING TITLE Research Data Analyst II	POSITION NUMBER 900-082-5731-031	REVISION DATE 08/17/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general supervision of the Chief, Budget Monitoring and Management Branch (Supervisor II), the Research Data Analyst II (RDA II) has the overall responsibility for gathering, compiling, editing, and interpreting quantitative financial data for use by the Department in the development of Program allocations, Budget Change Proposals (BCP) and Legislative analysis.

The incumbent acts as an authority in legislative processes in conjunction with monitoring and management of program resources and budget related schedules required by the Department of Finance. The incumbent will be responsible for creating, maintaining, and updating budget dashboards for Department. The incumbent coordinates research with other analysts when needed for budget analysis. The responsibilities are complex and critical to the management of support budgets. Incumbent will act as a lead analyst for the unit and may assist in training other analysts.

CORE COMPETENCIES:

As a Research Data Analyst II, the incumbent is expected to become proficient in 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, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- **Initiative**: Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Prosperity, Employee Excellence - Collaboration, Integrity, Pride, Stewardship)
- **Problem-solving and Decision-making** : Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- **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. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)
- **Organizational Awareness**: Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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. (Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- **Thoroughness**: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
---	-----------------

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

30%	E	Responsible for independently designing and updating Business Intelligence dashboards for the Division of Budgets, Budget Monitoring & Management Branch. Dashboards will include, but are not limited to, Statewide budget reporting, including current year and previous years, statewide staffing, and ad hoc requests.
30%	E	Provides coordination of sensitive and confidential material to be used during the annual Budget Change Proposal and Finance Letter processes and Legislative hearings; provides an extensive analysis of the budget documents and proceedings to management. Coordinate with the branch managers to facilitate cross functional communication and workflow within the Division.
20%	E	Independently provides research, planning, organization, and maintenance of budget monitoring and expenditure management for program support budgets. This includes setting work priorities and reviewing various budget reports and schedules regularly.
10%	E	Independently prepares and maintains various fiscal management reports which outline legislative funding decisions for the department. Analyze, communicate, and track, information for Budget Program items such as Budget Change Proposals and Finance Letters. Conducts research to develop best practices and maintain the master calendar for internal/external budget related scheduling, hearings, work plans, tracking and reporting on general Budget products, policy, and processes to assist the branch managers and support staff. Research best practices and implement methods to develop and maintain department-wide control totals as directed by branch manager(s).
5%	M	Makes recommendations to the Division, Office, and Branch Chiefs on special reports and projects as required by the Directorate, the Department of Finance, the California Transportation Agency, and the Legislature related to the support budget.
5%	M	Research and develop a plan for procedural improvements to budget processes, and coordinates the linking of various management information systems, with the Division of Budgets, Accounting and Personnel systems/processes to provide program efficiencies.

¹ESSENTIAL 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

No direct supervision. However, the incumbent may have a lead role in planning and coordinating the work of others on a variety of large, sensitive and complex assignments. Incumbent may assist with reviewing work of analysts and making recommendations.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires strong analytical and organizational skills. Knowledge of the State's budget operations and development process and requirements are desirable.

The RDA II must have the ability to:

- Employ research methods and techniques when examining and analyzing data
- Communicate effectively to individuals and groups, both orally and in writing
- Plan, organize and prioritize complex and sensitive workload issues to complete complex assignments
- Prepare and present technical information in a format suitable for management reporting
- Analyze information and make recommendations
- Establish and maintain cooperative working relationships

This position requires the ability to:

- Investigate, identify and propose solutions to problems that develop.

Incumbent must have knowledge of and become proficient with utilizing the computer based financial management system, spreadsheets, data visualization, including, but not limited to, creating, maintaining, and updating dashboards as needed, and other methods as necessary.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

This position is responsible for ensuring the technical integrity and continuous improvement of the Department's final Governor's Budget. Accuracy of data, analysis, and monitoring are essential to prevent loss of support dollars and delays in program delivery. Failure to ensure that this final product complies with established requirements could result in the Department's failure to have an acceptable budget product for the Department of Finance, Agency, and legislative review and approval.

PUBLIC AND INTERNAL CONTACTS

Has frequent contact with all levels of management, district, and headquarters resource staff on program budget issues. Effective communication is crucial to the success of getting the budget approved and may result in decisions that influence budget procedures and/or resource allocations. Relationships with external stakeholders and control agencies have a major impact on Department credibility and are crucial to the success of the Department.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal. Must be able to develop and maintain cooperative working relationships. Must be able to concentrate in order to review and create documents and meet strict deadlines; grasp the essence of new information; master new technical knowledge; multitask; adapt to changing priorities; complete tasks or projects with short notice. Must be able to deal effectively with pressure; exercise a high degree of independence in carrying out the assigned duties; and maintain focus and intensity yet remain optimistic and persistent even under adversity. Must be able to work effectively under rigid time constraints and pressure.

WORK ENVIRONMENT

Assignments are wide, varied and complex, involving tight deadlines, potential overtime, conflict, and the associated stress and tension in the development and monitoring the budget. Employee will work in a six-story climate controlled office under artificial light. Working hours will be set sometime between 7:00 a.m. and 5:00 p.m. using a standard five (5) day work week.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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
------------------------	------

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Research Data Analyst I	OFFICE/BRANCH/SECTION HQ / Division of Budgets / Monitoring and Management	
WORKING TITLE Research Data Analyst I	POSITION NUMBER 900-082-5729-924	REVISION DATE 08/17/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the direct supervision of the Chief, Budget Monitoring and Management Branch (Supervisor II), the Research Data Analyst I (RDA I) is responsible for gathering, compiling, editing, and interpreting quantitative financial data for use by the Department in the development of Program allocations, Budget Change Proposals (BCP) and Legislative analysis.

The incumbent acts as an authority in legislative processes in conjunction with monitoring and management of program resources and budget related schedules required by the Department of Finance. The incumbent will help with the development of creating, maintaining, and updating budget dashboards for Department. The incumbent coordinates research with other analysts when needed for budget analysis. The responsibilities are complex and critical to the management of support budgets.

CORE COMPETENCIES:

As a Research Data Analyst I, the incumbent is expected to become proficient in 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, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- Initiative**: Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Prosperity, Employee Excellence - Collaboration, Integrity, Pride, Stewardship)
- Problem-solving and Decision-making** : Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- 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. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)
- Organizational Awareness**: Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- 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. (Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)
- Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- Thoroughness**: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

30%	E	Under supervision, the incumbent will be tasked with creating and maintaining Business Intelligence dashboards for the Division of Budgets, Budget Monitoring & Management Branch. Dashboards will cover areas such as statewide budget reporting for both current and prior years, statewide staffing, and various ad hoc requests.
30%	E	With guidance, the incumbent coordinates sensitive and confidential materials needed for the annual Budget Change Proposal and Finance Letter processes, as well as Legislative hearings. The incumbent conducts thorough analysis of budget documents and proceedings for management and collaborates with branch managers to support cross-functional communication and workflow within the Division.
20%	E	With oversight, the incumbent independently conducts research, plans, organizes, and maintains budget monitoring and expenditure management for program support budgets. Responsibilities include establishing work priorities and regularly reviewing diverse budget reports and schedules to ensure accuracy and compliance.
10%	E	Under supervision, the incumbent is responsible for independently preparing and maintaining a variety of fiscal management reports that detail legislative funding decisions affecting the department. The role includes analyzing, communicating, and tracking information related to Budget Program items, including Budget Change Proposals and Finance Letters. Additionally, the incumbent conducts research to identify best practices, manages the master calendar for internal and external budget-related events, hearings, work plans, and tracks and reports on general budget products, policies, and processes to support branch managers and staff. The incumbent also researches and implements methods to develop and maintain department-wide control totals as directed by branch manager(s).
5%	M	The incumbent provides recommendations to Division, Office, and Branch Chiefs regarding special reports and projects requested by the Directorate, Department of Finance, California Transportation Agency, and Legislature in connection with the support budget
5%	M	Incumbent researches and develops a plan for procedural improvements to budget processes, and coordinates the linking of various management information systems, with the Division of Budgets, Accounting and Personnel systems/processes to provide program efficiencies.

¹ESSENTIAL 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
No direct supervision.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
This position requires analytical and organizational skills. Knowledge of the State's budget operations and development process and requirements are desirable.

- The RDA I must have the ability to:
- *Utilize research methods and techniques when examining and analyzing data;
 - *Communicate effectively to individuals and groups, both orally and in writing;
 - *Plan, organize and prioritize complex and sensitive workload issues to complete complex assignments;
 - *Prepare and present technical information in a format suitable for management reporting; analyze information and make recommendations;
 - *Establish and maintain cooperative working relationships.

Additionally, the incumbent must have the ability to investigate, identify and propose solutions to problems that develop.

The incumbent must have a basic understanding of and become proficient with utilizing the computer based financial management system, spreadsheets, data visualization, including, but not limited to, creating, maintaining, and updating dashboards as needed, and other methods as necessary.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

This position is responsible for ensuring the technical integrity and continuous improvement of the Department's final Governor's Budget. Accuracy of data, analysis, and monitoring are essential to prevent loss of support dollars and delays in program delivery. Failure to ensure that this final product complies with established requirements could result in the Department's failure to have an acceptable budget product for the Department of Finance, Agency, and legislative review and approval.

PUBLIC AND INTERNAL CONTACTS

Has frequent contact with all levels of management, district, and headquarters resource staff on program budget issues. Effective communication is crucial to the success of getting the budget approved and may result in decisions that influence budget procedures and/or resource allocations. Relationships with external stakeholders and control agencies have a major impact on Department credibility and are crucial to the success of the Department.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal. Must be able to develop and maintain cooperative working relationships. Must be able to concentrate in order to review and create documents and meet strict deadlines; grasp the essence of new information; master new technical knowledge; multitask; adapt to changing priorities; complete tasks or projects with short notice. Must be able to deal effectively with pressure; exercise a high degree of independence in carrying out the assigned duties; and maintain focus and intensity yet remain optimistic and persistent even under adversity. Must be able to work effectively under rigid time constraints and pressure.

WORK ENVIRONMENT

Assignments are wide, varied and complex, involving tight deadlines, potential overtime, conflict, and the associated stress and tension in the development and monitoring the budget. Employee will work in a six-story climate controlled office under artificial light. Working hours will be set sometime between 7:00 a.m. and 5:00 p.m. using a standard five (5) day work week. This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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
------------------------	------