

State of California - Department of Social Services

DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION:

Research Data Analyst I

POSITION NUMBER:

676-5729-XXX

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

FAD/Fiscal Forecasting Branch

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

Family Engagement and Equity Estimates Bureau/CalFresh Estimates - 676

SUPERVISOR'S NAME:

Cassandra Wagner

SUPERVISOR'S CLASS:

Supervisor I

SPECIAL REQUIREMENTS OF POSITION (CHECK ALL THAT APPLY):

- ☐ Designated under Conflict of Interest Code.
- ☐ Duties require participation in the OMV 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

Cassandra Wagner

DATE

7/06/2026

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 (FFB) is comprised of three bureaus: Family Engagement and Equity Estimates Bureau (FEEEB), Children, Adult, and Housing Programs Estimates Bureau (CAHPEB), and the Child Care Fiscal Services Bureau. The Branch is responsible for researching and analyzing information and data to determine the fiscal impact of state and federal policy changes, analyzing caseload changes and county expenditure trends, completing budget development, distribution of funding to counties, and development of county fiscal claim instructions.

The CalFresh and Nutrition Estimates Unit, within FEEEB, is responsible for providing fiscal support to the CalFresh and Nutrition programs to develop the local assistance estimates for the Governor's Budget to ensure counties have the funding necessary to implement these programs.

CONCEPT OF POSITION:

Under direct supervision of the Supervisor I, the RDA I will assist in the development of data driven projections methodologies using various internal and external data sources and will provide recommendations for improving current processes and procedures for data analysis and estimate methodology development. The RDA I will use a variety of research tools and techniques to provide technical assistance and analysis of related demographic and expenditure data and 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, exercise good judgment, and be able to effectively articulate and defend findings.

A. RESPONSIBILITIES OF POSITION:

Under the Direct supervision of the Supervisor I, the RDA I is responsible for conducting basic research; data gathering; assisting with the compiling, maintaining, and improving existing forecasting assignments; developing new forecasts; 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 Health and Human Services Agency; Department of Finance (DOF); Legislative Staff; and the Legislative Analyst's Office.

45% Utilizes 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. Assists in the compilation and analysis of expenditure and caseload trends over time. Uses Microsoft Excel and other visual analytic tools, presents trend and regression analysis and proposed options for improving allocation methodologies and expenditure projections.

25% 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% 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 presents to management, legislative staff, advocates, and other stakeholders.

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

B. SUPERVISION RECEIVED :

The RDA I receives direct supervision from a Supervisor 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 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, California Health and Human Services Agency, Legislature, stakeholders, and others.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analyses and supporting information used to forecast and allocate departmental funds and monitor county expenditures in excess of \$65 billion annually. Failure to provide accurate research and data findings may negatively affect the provision of information needed to appropriately support state and federal programs, which may negatively affect the provision of services to needy and vulnerable clients, and result in inappropriate over or under allocation of state funding.

F. OTHER INFORMATION:

The estimates prepared by the Fiscal Forecasting Branch are the foundation for the Governor's Budget as well as other legislation and are therefore subject to legislative schedules and time frames. In order to meet such deadlines, there are times throughout the year when mandatory overtime becomes a requirement for analysts in the branch.

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

State of California - Department of Social Services

DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION:

Research Data Analyst II (RDA II)

POSITION NUMBER:

800-676-5731-XXX

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

FAD/Fiscal Forecasting Branch

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

Family Engagement and Equity Estimates Bureau/CalFresh Estimates - 676

SUPERVISOR'S NAME:

Cassandra Wagner

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)
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- ☐ Other (Explain below)

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SUPERVISOR'S SIGNATURE

Cassandra Wagner

DATE

7/06/2026

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.

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

The RDA II is called upon to act in the absence of his/her supervisor. The RDA II acts as a liaison with CDSS program staff and may be required to present and defend projections and estimates to the Department of Finance, the Legislative Analyst and fiscal legislative consultants. The RDA II frequently acts in a lead capacity in the development of complex estimates for the Local Assistance Governor's Budget and the May Revision processes by incorporating background, key assumptions, methodology descriptions and proposed funding. 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:

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The CalFresh and Nutrition Estimates Unit, within FEEEB, is responsible for providing fiscal support to the CalFresh and Nutrition programs to develop the local assistance estimates for the Governor's Budget to ensure counties have the funding necessary to implement these programs.

CONCEPT OF POSITION:

Under the general direction of a Supervisor I, the RDA II is responsible for the conceptualization and development of highly complex estimating methodologies for the Department's CalFresh and Nutrition programs. It is desirable the RDA II have an understanding of CalFresh and Nutrition policies and experience in interpreting and applying statutes, regulations and procedures. The RDA II will use statistical and other quantitative techniques for independently planning and designing research study methodology and compiling, analyzing and interpreting data used in the development of estimates of costs or savings affecting the Department's Program. The RDA II is responsible to provide technical assistance and guidance in the analysis of related caseload and expenditure data to determine shifts and trends by using and interpreting the data available through the estimate process, the Department's data collection systems and any external resources available to the Department. The RDA II must be able to reason logically and creatively to analyze and explain data, develop estimating methodologies and assumptions, and is expected to use a variety of analytical techniques to provide necessary projections and consultation.

A. RESPONSIBILITIES OF POSITION:

Essential Functions:

- 40% Plans and designs study approaches, develops and implements research methodologies, interprets findings, provides complex fiscal and caseload analysis and projections to calculate various impacts related to assigned program areas. This includes researches program assumptions, develops estimates methodologies and assesses economic, demographic and social variables. Utilizes intermediate statistical techniques. Develops forecasts and trends, project and estimate future economic and program activities. The RDA II uses statistical and estimates models, confers with program and research staff, prepares structured, professional written descriptions and explains the recommendations to upper management and outside control agencies for the Governor's Budget, the May Revision and legislative processes; and other policy and decision-making processes.
- 20% Uses expertise to develop data parameters, defines the research purpose and question and explores the broader impacts and policy implications to assigned program areas. The RDA II is expected to use multiple data sources such as data collected on social services; from other states; from other governmental agencies such as Department of Finance, the counties and the federal government; studies by private entities and university researchers; as well as population statistics and census data. The RDA II is responsible in using data sources to complete ad hoc forecasts, 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 and prepare written reports of the findings to provide recommendations for management decisions.
- 20% Reviews and analyzes the more complex and sensitive legislation, regulations, and policy initiatives. This includes, determining if there is any research data available that supports the Department's position and assessing the appropriateness of application to fiscal analyses. The RDA II is responsible in developing a recommendation based on all the findings, and present to executive directorates, control agencies, legislative staff, advocates, and other stakeholders.
- 15% Functions as a lead expert to ensure the integrity of all estimating procedures by conducting research on various estimating methods and developing more accurate data information systems, sources and studies designed to measure the fiscal impact and caseload of program activities. Identifies new innovative techniques to develop new solutions to access and use data.

Marginal Functions:

- 5% Performs other duties pertaining to Fiscal Forecasting Branch.

B. SUPERVISION RECEIVED:

The RDA II receives general supervision from a Supervisor I, and is expected to act with high degree of independence in the development and application of research methodology and techniques in addition to the development of fiscal forecasting models and techniques.

C. ADMINISTRATIVE RESPONSIBILITY:

None. However, the RDA II represents the Branch on multi-disciplinary teams and has primary responsibility for critical and sensitive projects and activities. The RDA II is responsible for the identification of required changes and steps necessary to implement enhancement to the estimate and forecast methodologies and techniques utilized in the Branch.

D. PERSONAL CONTACTS:

The RDA II meets with the Fiscal Forecasting Branch Chief and Bureau Chiefs, as well as other departmental managers when designing research and developing estimates for programs. The RDA II interfaces with control agencies such as the Department of Finance and California Health and Human Services Agency, as well as the Legislature, stakeholders, etc. The RDA II serves as a team lead, working closely with Analysts 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 \$65 billion annually. Failure to exercise good judgment 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 research, statistical, and forecasting techniques and the utilization of computer resources in the application of these techniques.

The estimates prepared by the Fiscal Forecasting Branch are the foundation for the Governor's Budget as well as other legislation and are therefore subject to legislative schedules and time frames. In order to meet such 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.