STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Research Data Analyst I	PBMD/Bus Mgmt/Technology Business&Financial Mgmt	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Technology Business Management Analyst	900-170-5729-003	10/29/2026

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

GENERAL STATEMENT:

Under the supervision of the Technology Business and Financial Management (TBFM) Chief, a Research Data Supervisor I (RDSI), the incumbent participates in the maturation and expansion of the enterprise Technology Business Management (TBM) application, known as the Transparency and Financial Management (TAFM) tool. In this capacity, the incumbent will participate in the development of reports and methodologies, data analysis, data validation, data import/export, and development and design of transformations between enterprise-wide data sets. The incumbent will help create and interpret reports/dashboards to meet business user requirements. Resolve system problems relating to configuration, data quality and system enhancements. Plays a support role in the IT budget development, tracking, processing and projection responsibilities of the TBFM Office.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - Innovation, Integrity, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity, Employee Excellence - Innovation, Integrity, People First, Pride)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Prosperity, Employee Excellence - Equity, Integrity, People First, Pride)
- **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 - Integrity, People First, Pride)
- **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. (Prosperity - Collaboration, Integrity, People First)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity - Integrity, People First, 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. (Employee Excellence - Collaboration, Integrity, People First)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation, Integrity, Pride)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Equity, Employee Excellence - Collaboration, Innovation, Integrity, People First, Stewardship)

TYPICAL DUTIES:

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

Americans with Disabilities Act (ADA) Notice: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

25%	E	In a learning capacity, participate in the ongoing development and maturation of the Technology Business Model (TBM), now known as the Transparency and Financial Management (TAFM) model for Caltrans IT. Under the guidance of the RDS I, assist in the gathering of functional and business requirements and translate information into a working set of operational and financial models, dashboards, and management reports. Work with IT subject matter experts to undertake data gathering of various Enterprise wide inventories and financial resources. Work closely with the TBM team to validate the developed dashboard reports to provide relevant insights to IT Management and Executives. Participate in efforts to develop and mature data sources, report accuracy, and ensure adaptability to changing business needs. Contribute to the alignment of report development processes and technologies with IT and business strategies; report results to managers and stakeholders, as necessary. With oversight and guidance from the RDS I, perform functions including, model configuration, data gathering, trouble-shooting and ongoing development of the enterprise TBM office and reporting tool.
25%	E	Under the supervision of the RDS I, resolve problems relating to configuration, data quality and system enhancements. Develop TBM model allocation strategies that closely reflect the current process and/or goals of the enterprise. Work closely with TBM Consultants to execute TBM best practices and guided work on allocation strategies aligned to TBM standard taxonomy. Work with IT staff to identify, document and implement the automation of data source exchanges through the development of Application Programming Interfaces (API) or other methods. Provide guidance and training on the use and administration of the TBM enterprise tool. Work closely with managers, executives, and other IT staff, one on one or in groups, to identify requirements and develop dashboards and reports using multiple data sources. Create processes and technologies for management that are necessary to plan, build, manage and execute automated reports and dashboards for display via the TBM application allowing drill though capability to detailed data. Assist in the development, review, and execution of standards to ensure processes are repeatable and data is being pushed or pulled accurately and efficiently. Analyze output from TBM application and communicate results to relevant parties. Identify use-cases, data, and process improvement opportunities.
25%	E	Assists in the tracking, monitoring and projecting of both the Personnel Services and Operating Expense components of the IT budget. Develops and prepares expenditure report utilizing InfoAdvantage and AMS advantage. Develop and maintain charge coding resources for appropriate allocation of expenditures. Prepare and process expenditure adjustments and corrections, and develop financial reports for internal and external use and compliance.
20%	E	Review and process Purchase Request (PR) packets, Standard Requisitions (RQS), Purchase Orders (PO), and Contracts (CT) as needed by the IT Divisions, Procurements, DPAC and Accounting. Develop, update and maintain the annual IT Spending Plan for Operating Expenses including coordination and facilitation of regular meetings with IT Executive Team and Subject Matter Experts to ensure IT is on track to successfully execute the Plan. Collaborate with IT executives, management, and IT Budgets on IT financial metrics, and cost transparency initiatives.
5%	M	Provide consistent, efficient services to customers by using repeatable standardized processes, staff knowledge, and expertise. Continue self-improvement by developing skills through training and individual research. The incumbent may perform other related duties.

[1]ESSENTIAL 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
The incumbent has no direct supervisory responsibilities.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Knowledge of: Data analysis methods and techniques including gathering and collection of structured and unstructured data, as well as general principles, concepts and terminology used in research; planning studies and investigations; trend analysis procedures; time management techniques to provide for efficient prioritization and completion of projects and assignments; software to prepare spreadsheet summaries, reports, charts, and tables; basic arithmetic and statistical techniques to analyze numerical data; and departmental policies and procedures.

Ability to: Research, gather, compile, and analyze structured and unstructured data; conduct and interpret descriptive statistical analyses using appropriate software to test research hypotheses and to formulate conclusions and recommendations; prepare research and statistical reports; analyze written and numerical data regarding general governmental problems; speak and write effectively; develop and evaluate alternatives, recommendations, solutions, and conclusions or approaches to research

Americans with Disabilities Act (ADA) Notice: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

problems; manage a workload consisting of multiple projects and assignments; complete work under critical timelines to meet project. objectives and deadlines; be objective and flexible to adapt to changes in priorities and work assignments; and gain and maintain the confidence and cooperation of others, collaborate, and work in multidisciplinary teams.

Perform effectively in a fast-paced environment.

Use Microsoft Excel, Visio, Project, APPTIO and Microsoft Office applications.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

At the Research Data Analyst I level, incumbents work under close guidance and direction from their supervisor and are responsible for individual decisions and actions. Poor decisions or recommendations could result in significant losses of departmental efficiencies through unnecessary delays, loss of data, equipment damage, loss of employee productivity and possible user dissatisfaction.

PUBLIC AND INTERNAL CONTACTS

Daily contact is made with a wide range of users to provide technical information and solve problems. Contact occurs with other IT staff throughout the organization, vendors, and external entities. The nature of these contacts is not routine as the purpose and extent of each contact is different. Contact is made to plan, coordinate, and advise on work efforts which resolve operating problems. Contact is sometimes made to influence and motivate individuals working cooperatively toward mutual goals.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone and may be required to lift and move supplies and equipment from one location to another. The incumbent must be able to walk between multiple State buildings and have a thorough knowledge of Caltrans building locations. This is a fast-paced job with a lot of deadlines. Thus, the incumbent in this position will be required to multi-task, be open to change, adapt to changes in priorities and policies, and to complete tasks or projects with short notice. The incumbent must be able to sustain mental activity needed for problem solving which includes reading, writing, analyzing, understanding, interpreting, consulting, developing alternatives, drawing sound conclusions, and recommending, implementing and evaluating solutions. The incumbent must be able to exercise sufficient control over emotions to gain and maintain the confidence and respect of others, recognizing and acknowledging emotionally charged issues or problems and responding appropriately to them.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's 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.

If not working remotely, the employee will work in a climate-controlled office under artificial lighting using a personal computer. The employee may be required to work for extended periods of time in a computer room that maintains an approximate temperature of 70 degrees.

The employee may be required to travel. When available, a State vehicle will be provided. Possession of a valid driver's license is required when operating a State owned or leased vehicle. If the employee utilizes their own personal vehicle, they may be reimbursed for travel expenses.

The employee may be required to occasionally work overtime outside of normal work hours to resolve problems. Applicable compensation will follow the current and appropriate bargaining unit contract.

Americans with Disabilities Act (ADA) Notice: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

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

Americans with Disabilities Act (ADA) Notice: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.