STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Research Data Analyst II	Office of Resource Planning & Policy/Statewide Resource Mgmt	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Research Data Analyst II	702-046-5731-XXX	

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

GENERAL STATEMENT:

Under the general direction of the Supervisor I, Statewide Resource Management Branch, the Research Data Analyst II is responsible for conducting independent research and analysis of existing financial processes, systems, and budgetary data to identify opportunities for improvement and develop new processes and methodologies for managing the Administration Program's annual budget. The incumbent performs complex analytical assignments in providing statewide budgetary support for the Administration Program and its districts. Responsibilities include researching, analyzing, and monitoring budget allocations and expenditures, including Personal Services, Position Management, and Operating Expenses. The incumbent also develops financial reporting methodologies, analytical tools, and data visualizations to identify fiscal trends and patterns, evaluate financial performance, and enhance management's ability to make informed budgetary decisions. Additional responsibilities include analyzing, reviewing, and evaluating budget documentation; preparing budgetary recommendations; and proactively identifying and resolving budgetary discrepancies.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Employee Excellence - Innovation, Integrity, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Stewardship)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Employee Excellence - 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 - 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)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration)
- **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)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Prosperity, Employee Excellence - 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 - Stewardship)

TYPICAL DUTIES:

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

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50%	E	Researches, gathers, analyzes, and interprets complex financial program data to support statewide Administration Program fiscal planning, resource allocation, and operational decision-making. Independently develops and applies analytical methodologies to evaluate historical expenditures, current financial activity, projected resource requirements, and alternative financial strategies to meet Program needs. Applies statistical analysis, forecasting techniques, and other analytical methods to identify trends, patterns, variances, anomalies, and emerging fiscal issues and to evaluate their potential impact on Program operations and resources. Queries, extracts, compiles, manipulates, validates, and analyzes complex technical and quantitative program data from a variety of data sources, including but not limited to CGI Advantage, InfoAdvantage, Enterprise Datalink, and departmental databases. Develops and maintains datasets and analytical models by integrating information from multiple sources to support recurring and ad-hoc analytical needs. Independently develops expenditure forecasts and evaluates statewide and divisional allocations, expenditures, encumbrances, fund sources, contracts, and projections. Researches and resolves discrepancies through analysis of source data and related financial records and develops recommendations for corrective action. Provides monthly and year-end expenditure forecasts to the Division of Budgets and analyzes and responds to budget drills and other fiscal information requests.
40%	E	Independently designs, develops, and maintains analytical models, dashboards, reports, and data visualizations to support statewide Administration Program fiscal management and performance evaluation. Uses Microsoft Power BI and other analytical tools to extract, transform, integrate, and analyze data from multiple sources and develop interactive dashboards and visual aids for management and program stakeholders. Determines appropriate data sources, measures, relationships, calculations, and analytical methodologies to accurately represent financial and programmatic information. Develops, tests, and validates data models, calculations, datasets, and analytical outputs to ensure accuracy, consistency, reliability, and appropriate interpretation. Researches and resolves data quality issues and modifies analytical models and reporting methodologies as information needs evolve. Develops performance-based budgeting metrics and analytical measures related to milestones, benchmarking, trends, performance indicators, and best practices. Designs data visualizations that enable management to identify trends, patterns, relationships, variances, and emerging issues. Interprets analytical results and communicates significant findings through dashboards, reports, visual aids, and presentations.
10%	E	Independently plans and conducts research and analytical projects addressing special assignments, emerging program fiscal issues, and ongoing Program information needs. Identifies required data, information, materials, and resources; determines appropriate research and analytical methods; gathers and evaluates information from multiple sources; and analyzes quantitative and qualitative information to develop conclusions and recommendations. Prepares analytical reports, fiscal analyses, and recommendations in response to requests from management, the Office of Budgets, districts, and divisions.

[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
None, but will act as lead in the Statewide Resource Management Unit.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The position requires knowledge of the Department's statewide organizational structure, knowledge of the state budget development process, and principles and current trends in administrative functions as they relate to resource management practices and program evaluation. Must have knowledge of the Department's vision, mission, and goals.

The incumbent must have knowledge of personal computer applications, software (Microsoft Excel and Power BI), data

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visualizations, databases, and become knowledgeable and proficient with CGI Advantage, InfoAdvantage, Enterprise Datalink and other Departmental financial databases.
The incumbent must have the ability to reason logically and creativity; use various analytical techniques to resolve complex budgetary problems, develop and evaluate alternatives, and draw sound conclusions; and present recommendations and information through oral and written communication methods to management on matters relating to the program budget. Must be able to establish and maintain priorities and a level of professional integrity to ensure that the best interests of Administration and the Department are served. The incumbent must also have the ability to work well in the interdisciplinary team concept and be able to function in a lead capacity when called upon.

The incumbent must have the ability to establish and maintain cooperative working relationships with departmental staff at all levels within the Department. In addition, the incumbent must be able to speak and write effectively and adopt an effective course of action; develop effective management reports and recommendations based upon sound logical conclusions; maintain confidentiality; and develop and maintain team effort and cooperation among staff.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The incumbent will have a significant impact on Administration's ability to carry out its program responsibilities. Good judgment, tact, and the ability to communicate effectively are expected of the incumbent. Budget and resource management errors could result in improper management decisions at all levels, inaccurate financial reporting, and mismanagement of departmental funds, incorrect budget decisions and noncompliance with statutory requirements. Poor judgment in any of these areas would severely constrain Administration's ability too meet program commitments. Errors may have a significant impact on the internal and external operations of the Department.

PUBLIC AND INTERNAL CONTACTS
The incumbent maintains communication with all levels of Department staff, including executive staff, for the purpose of providing guidance and direction, and works closely with liaisons in Accounting and Budgets, as well as the districts and divisions. All contacts require tact and sensitivity.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
The incumbent must be able to read and understand a variety of accounting and budgeting documents. The incumbent will hand key data into a computer terminal, sitting or standing, and analyzing data. The incumbent must be able to respond to changinf priorities and short deadlines while developing and maintaining positive and cooperative working relationships. The incumbent must be able to work effectively with high-level executives.

WORK ENVIRONMENT
The incumbent will work in a climate-controlled office setting environment with artificial and natural lighting. The incumbent will occasionally take transportation or walk to other State facilities to attend meeting or hand-deliver documents in variety of weather conditions.

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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

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