STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Research Data Analyst II	Transportation Planning/Transportation Economics Branch	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Economist	900-074-5731-921	11/23/2026

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

GENERAL STATEMENT:

Under general supervision of the Transportation Economics Branch Chief, a Senior Transportation Planner, the Research Data Analyst II conducts transportation economic and financial research and provides analysis, information, estimates and projections of benefit-cost and economic and financial impact of transportation investment projects and programs. The Research Data Analyst II will manage contracts, provide oversight and input, and review deliverables related to transportation planning and programming activities and assist in the application of a macroeconomic model in support of the California Transportation Plan.

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 - People First)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - Innovation)
- **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)
- **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. (Prosperity, Employee Excellence - Collaboration, Integrity)
- **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, Integrity)
- **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. (Equity, Employee Excellence - Innovation, Integrity)
- **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 - Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration, Equity, Integrity)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Equity, Employee Excellence - Innovation, Integrity)

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.

40%	E	Independently collect, compile and process socio-economic and funding data from various sources; perform statistical and econometric analyses of data series to determine trends, draw inferences, and report findings. Conducts research and gathers background information and material for various issue and policy analyses as required. Responsible for reviewing the periodic update of the "Transportation Funding in California" document provides highly technical assistance to external stakeholders that is complex in nature such as benefit-cost, economic impact analyses; and serves as an analyst when responding to ad hoc requests to legislative inquiries regard to economic impact analyses. The incumbent will collaborate in the preparation of economic impact reports for the Interregional Transportation Improvement Program (ITIP) projects; the incumbent will also manage contracts, provide oversight, and review deliverables to support a variety of economic matters.
25%	E	Independently conduct benefit-cost analysis of transportation infrastructure projects; conduct economic impact assessments and investment analysis of various projects and policy; and participate in macroeconomic modeling efforts for the California Transportation Plan.
25%	E	Independently review and analyze Federal, State and Local transportation funding resources, assesses current balance requirements, and conducts resource estimations and evaluation. Develops and support training of headquarters and district staff in transportation funding and financing sources, uses, methods and analysis necessary for transportation planning and project selection.
5%	M	Conduct analysis of Federal and State legislative bills regarding funding, taxes, fees, and regulations related to transportation and the Department's policies and activities. Re-mediate and check documents produced or shared with the Transportation Economics branch to make sure they are ADA Compliance.
5%	M	Perform other job-related duties within the scope of the classification as assigned.

[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

This position does not supervise, may act in a lead capacity over student assistants.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires a background in research methodology and evaluation research, benefit-cost analysis, and statistical concepts and methods, computerized models and applications, and knowledge of current departmental policies and programs. Be able to recognize evolving economic, financial, and fiscal issues related to transportation policy; plan and conduct research projects; collect and analyze data and present findings in a structured, professional technical report; communicate and work effectively as an individual or as a team member; and act effectively as a trainer of large and small groups. Have the ability to recognize evolving economic, financial, and fiscal issues related to transportation policy; design, plan and conduct complex research projects; analyze and present findings in a structured, professional technical report; act independently; communicate and work effectively as an individual or as a team member; and act effectively as a trainer of large and small groups.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Recommendations and decisions made by this position directly impact the Department's overall planning program as well as those of regional and local agencies. Failure to consider the political sensitivity or to fully evaluate the fiscal, economic, social and environmental effects of decisions on the Department's programs could lead to inefficient use or loss of funding, delay of project delivery, and ineffective transportation planning.

PUBLIC AND INTERNAL CONTACTS

The incumbent makes and maintains professional contacts with other public agencies and private concerns, as well as with the various programs and district offices of the Department. Internal contacts include presentation of research results to the Department management, and consultative advice to the staff of other programs and district offices.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Develops new insights into situations and applies innovative solutions to make organizational improvements.

WORK ENVIRONMENT

The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of

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.

working in a sitting or standing position.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee's designated Headquarters 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.

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.

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Research Data Analyst I	Transportation Planning/Transportation Economics Branch	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Economist	900-074-5729-921	11/23/2026

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

GENERAL STATEMENT:

Under direct supervision of the Transportation Economics Branch Chief, the Research Data Analyst I assists in the development of project benefit-cost analysis and economic and fiscal impact reports; collection, analysis, and interpretation of data as input into transportation planning and programming activities, and provides supports in the preparation of technical reports to management and other units within the Department.

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 - Integrity, People First)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Equity - People First, 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. (Equity - Equity, Integrity)
- **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 - People First)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - 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. (Employee Excellence - Equity)
- **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)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Integrity)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Employee Excellence - Integrity)

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M)[1]	Job Description
45%	E	Assists the lead analyst in collecting, compiling and processing socio-economic and funding data from various sources; perform statistical and econometric analyses of data series to determine trends, draw inferences, and report findings. Conducts research and gathers background information and material for various issue and policy analyses as required.
25%	E	Assists the lead analyst in conducting benefit-cost analysis of transportation infrastructure projects; provide support in conducting economic impact assessments and investment analysis of various projects and policy; and support macroeconomic modeling efforts for the California Transportation Plan.

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.

20%	E	Assists the lead analyst in the review and analysis of Federal, State and local transportation funding resources, assess current balance requirements, and conduct resource estimations and evaluation. Help develop and support training of headquarters and district staff in transportation funding and financing sources, uses, methods and analysis necessary for transportation planning and project selection.
5%	M	Assists the lead analyst in the analysis of Federal and State legislative bills regarding funding, taxes, fees, and regulations related to transportation and the Department's policies and activities.
5%	M	Perform other job-related duties within the scope of the classification as assigned.

[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
This position does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Have effective writing and analytical skills and possess basic knowledge of research methodology, statistical techniques, economics and finance, and analytical procedures. Be able to follow directions and guidelines provided to carry out research projects, analyze results and formulate recommendations, prepare and present reports. Be willing to learn and utilize computerized models used in economic and statistical analysis.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Information and analysis provided by this position supports most of the economic analysis conducted in the Office as well as the Department's overall planning program. Failure to fully evaluate the fiscal, economic, social and environmental effects of decisions on the Department's programs could result in the inefficient use or loss of funding, delay of project delivery, and increased project costs, litigation, or damage to the Department's credibility as a responsible public agency.

PUBLIC AND INTERNAL CONTACTS
Make and maintain professional contacts with other public agencies and private concerns, as well as with the various programs and district offices of the Department.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. Ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Develops new insights into situations and applies innovative solutions to make organizational improvements.

WORK ENVIRONMENT
The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee’s designated Headquarters 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.

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.