

California Department of Tax and Fee Administration

DUTY STATEMENT

CURRENT
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Research Data Specialist III		WORKING TITLE Research Data Specialist III	
DIVISION/OFFICE/UNIT Financial Management Division/Research & Statistics Section		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA	
SEERA DESIGNATION Rank & File	BARGAINING UNIT R01	WORK WEEK GROUP E	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED May act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-351-5770-	
<i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i>			
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of the Research Manager, Research and Statistics Section, the Research Data Specialist III (RDS III) helps shape tax policy for the state of California by serving as the California Department of Tax and Fee Administration (CDTFA) expert technical advisor responsible for planning, organizing, and conducting a variety of data analysis and revenue estimates. Continuously monitors the flow of tax receipts to ascertain if changes in system processes and taxpayer behavior have altered historical relationships that will impact estimates. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
50%	<u>ESSENTIAL JOB FUNCTIONS</u> The RDS III creates reports and analyzes tax data across CDTFA's 37 tax programs to identify trends and share insight with the public through newsletters and other publications. RDS III uses Structured Query Language (SQL) and PowerBI to execute queries and retrieve and analyze data from CDTFA taxable sales database. Additional projects and studies involve economic forecasts, revenue estimates, and analysis of taxable sales data at the state and local level. RDS III monitors the flow of tax receipts to ascertain if changes in system processes and taxpayer behavior have altered historical relationships and estimates. The position is also responsible for providing department-wide expert consultative and advisory services regarding economic forecasts, revenue estimates, and taxable sales activity.		
25%	Develops and tests economic research methodologies and data sources to validate accuracy in forecasts, taxable sales data, and estimates. Provides guidance to other Department staff with respect to revenue estimates, sales tax allocation data, and economic research.		
10%	Serves as subject matter expert on the completion of studies in response to requests from a variety of sources regarding taxable sales either by geographical area or by type of business, as well as requests from California communities and external stakeholders. Responsible for independently preparing ongoing and one-time studies and coordinating the preparation and presentation of revenue estimates.		
10%	Serves as one of CDTFA's top technical advisors responsible for advocating and explaining the department's position regarding taxable activity data, reports, and analysis. Provides consultative and advisory services to the Executive Director, executive management, and program staff.		
5%	<u>MARGINAL JOB FUNCTIONS</u> As needed, conducts a variety of the most complex and/or sensitive special projects or studies independently or as part of a collaborative team.		

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB *(if applicable):*

Work Environment:

- The position is located in a high-rise building.
- Standard office environment with artificial lighting and controlled temperature.

Physical Abilities:

- Requires being in a stationary position, consistent with office work, for an extended period of time.

Additional Requirements/Expectations:

-

I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

PRINT EMPLOYEE NAME

EMPLOYEE'S SIGNATURE

DATE

I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.

PRINT SUPERVISOR NAME

SUPERVISOR'S SIGNATURE

DATE

HRB Approval Date: 9/28/2023

C&P Analyst Initials: EH