

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Research Data Analyst II	OFFICE/BRANCH/SECTION 85/EEOP/Data and Mandated Reports Unit	
WORKING TITLE Research Data Analyst II	POSITION NUMBER 900-040-5731-005	REVISION DATE 09/25/2024

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under general supervision of a Staff Services Manager (SSM) I, Data and Mandated Reports Unit, the Research Data Analyst (RDA) II is responsible for maintaining the Department's Equal Employment Opportunity Program's (EEOP) mandated reports, performing research, analysis, and data visualization on EEOP topics, and collaborating internally and externally in support of EEO and Diversity, Equity, and Inclusion (DEI) activities. The RDAII develops internal and external partnerships supporting a collaborative approach to EEOP activities, and effectively communicates insights from a dataset through storytelling using narratives and visualizations. Will work closely with other analysts to compile data for various mandated reports and provide narratives as needed.

The incumbent must have a thorough knowledge of the Department's EEO Director's Policy (DP) and Deputy Directives (DD) and Equity Statement, Title VII of the Civil Rights Act of 1964, Fair Employment and Housing Act, Government Code (GC Sections 12920-12951), Code of Federal Regulations (CFR 23), and DEI principles and initiatives. EEOP is a critical partner implementing the Department's Equity value and leading diversity and inclusion, tackling matters regarding discrimination and harassment proactively and holistically. Travel may be required. Duties of the position include, but are not limited to:

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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Fostering Diversity:** Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
45%	E	Under general supervision of the SSMI Data and Mandated Reports Unit, the incumbent will perform complex research, tracking, and presentation of data as it relates to analyzing the effects of structural inequities within the department. The incumbent will be responsible for supporting both the Discrimination Complaint Investigation Unit (DCIU) and the Training Resource Unit (TRU) by using data analysis to develop, analyze, modify, and maintain statistical reports. The incumbent will design and test complex databases for EEO project delivery and program operations, policy analysis, and will work cooperatively with management and program staff concerned with data analysis, database programming and database management techniques. Independently use data analysis, data management, statistical methods, and forecasting techniques to identify trends and track performance in a variety of areas in the EEO Program. Research, compile, analyze, and interpret complex technical program data from a variety of sources including, but not limited to: Smartsheet, Tableau, FileMaker, Power BI, strategic plans, dashboards, and various reports. Assemble and edit datasets from data warehouses and other sources, and use data analysis findings to present recommendations to management. Review and analyze statistical workload data. Will work closely with other analysts to compile data for various mandated reports and provide narratives as needed.
40%	E	Incumbent will leverage expertise to collaborate with EEO management and staff, addressing operational data needs to enhance business efficiency. Independently conduct comprehensive research on metrics, data products, methods, limitations, usability, and strategies. Review and analyze complex statistical workload data based on Program priorities, while researching and tracking workload trends. Manage dashboards such as DCIU, Training, and Key Performance Indicators (KPIs). Additionally, perform ad-hoc data visualization and reporting.
10%	E	Develop and implement processes and procedures for reporting, both standard and ad-hoc reports, using information from various databases and data sources. Develop and deliver presentations as directed by management.
5%	M	Performs special projects or other related tasks, as needed. Acts as a backup to other EEO Program staff. Act as lead over other staff within the Data and Mandated Reports Unit.

¹ESSENTIAL 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. May function as a lead for certain assignments as well as assist in providing technical expertise to facilitate staff development on an ad-hoc basis.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: General understanding of journey level research, data analysis, and statistical methods and techniques 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; design and implement research-related projects; practices required to ensure and maintain data security, including securely transmitting confidential data; experimental design procedures; problem-solving techniques and processes to identify and resolve issues related to the completion of work assignments; and advanced mathematical techniques and descriptive statistical analysis techniques and methods.

Must also possess a thorough knowledge of the Department's mission, vision, goals, and programs; laws, rules, and policies of the State of California and the Federal government relating to program delivery functions.

Ability to: In addition to Microsoft Excel and Power BI, the incumbent should possess computer skills (including Microsoft Office Suite and other business intelligence software programs) to query, validate, format, and organize structured data; prepare research and statistical reports; develop and evaluate alternatives; 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; collaborate, and work in multidisciplinary teams; query, mine, analyze, and manipulate data; communicate effectively both orally and in writing to individuals and groups related to the area of research;

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present ideas and information effectively; analyze quantitative and qualitative data to reach sound conclusions and/or make recommendations; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Responsible for effective, pertinent, and accurate collection of information necessary for the development, documentation, and maintenance of EEOP databases and systems; responsive reporting and analytical support on various subjects in alignment with EEO and DEI initiatives. Failure to effectively evaluate, interpret, and provide clear reports on both data and information can directly impact program operations. Misjudgment may also have a detrimental effect on operations and hinder the achievement of program goals. Errors could result in budget cuts to the program and mismanagement of public funds, adversely affecting EEOP's ability to deliver on the program.

PUBLIC AND INTERNAL CONTACTS

Has daily contact with all levels of employees in EEOP and various other programs located throughout the state, as well as outside vendors. The incumbent must work in partnership with various interdisciplinary teams comprised of varying degrees of classifications within EEOP and Caltrans.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements may subject incumbent to occasional bending, stooping, and kneeling. Incumbent must have ability work on a keyboard, with a video display terminal and may be required to sit and/or stand for long periods of time.

Requires the ability to develop and maintain cooperative working relationships. Must be able to sustain mental activity as needed for problem resolution, evaluating large amounts of data, report writing, analysis, and reasoning. Must have the ability to multitask, adapt to changes in priorities, and complete tasks or projects with short notice. Must be able to organize and prioritize large volumes of varied documents. Incumbent must be able to deal effectively under pressure, maintain focus and intensity even under adversity.

Must be open to change and new information, adapts behavior and work methods in response to new information, changing conditions or unexpected obstacles. Must be able to manage a diverse workload, delegate assignments as appropriate, and keep manager apprised of workload status and any items that may impact timely completion. Required to consider and to appropriately respond to the needs, feelings, and capabilities of different people and different situations. Must use tact and treat others with respect.

WORK ENVIRONMENT

While at the base of operation, the incumbent will work in a climate-controlled office under artificial light. There will be occasional fluctuations in building temperature. The work site may have limited viewing access to the outdoors and the incumbent may be assigned cubicle space as a base of operation. The incumbent will periodically attend meetings and/or training outside the office. Working hours may be set sometime between the hours of 8:00 a.m. to 5:00 p.m.

The incumbent may be required to travel to other State offices for training purposes including district offices and field offices throughout the state.

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, as determined by the Department. The selected candidate may be required to travel to the headquartered location. All expenses to travel to the headquartered location will be the responsibility of the selected candidate.

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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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