

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Research Data Analyst II	OFFICE/BRANCH/SECTION Independent Office of Audits and Investigations	
WORKING TITLE Business Intelligence Analyst	POSITION NUMBER 900-097-5731-XXX	REVISION DATE 11/13/2024

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 the general supervision of the Business Intelligence (BI) Supervisor with the Independent Office of Audits and Investigations (IOAI), the incumbent will perform more independent, responsible, varied and complex, technical research, data analysis, and statistical work utilizing structured and unstructured data and disparate data sources to identify data trends, anomalies, and outliers. Additionally, the incumbent will use data analytics and visualization software to develop and maintain unique reports that will be presented to internal and external stakeholders.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Cultivate Excellence - Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Cultivate Excellence - Engagement)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Pride)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Cultivate Excellence - Innovation)

TYPICAL DUTIES:

Percentage	Job Description
50% E Essential (E)/Marginal (M) ¹	Use data analytics, visualization, and business intelligence software (such as Power BI, Tableau, etc.) to extract insights from data. Use insights from data to independently develop and maintain high quality (valid, reliable) and meaningful data reports, visualizations, and dashboards. Analyze data to identify recurring patterns and significant trends. Use independent data research skills to develop innovative strategies and solutions for addressing immediate and ongoing information needs of IOAI and Caltrans. Periodically update dashboards to ensure the data is accurate and timely. Conduct thorough data analysis to verify the quality, reliability, and accuracy of the data employed.

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25%	E	Thoroughly and independently document all aspects of the data analysis process, including the specific records reviewed, methodologies employed, and resulting conclusions, to provide robust support for findings. Independently review program data from a variety of sources. Properly handle sensitive data that has confidential information and refrain from disclosing that information to unauthorized individuals. Independently perform regular routine maintenance and updates on various dashboards and reports.
15%	E	Attend trainings on business intelligence, data analytics, and/or fraud to ensure ongoing education and knowledge of trends in the industry. Participate in IOAI committees and other meetings as needed. Prepares the agenda and minutes for various BI Unit meetings and/or IOAI committees.
10%	M	Perform other duties and special data research projects as required to support the BI Unit and IOAI.

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

This is a non-supervisory position, may have primary responsibility for a data research project or activity. This position may lead and/or collaborate with teams working in or with the BI Unit.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Basic math, algebra, and statistics. Ability to research, gather, compile, and analyze structured and unstructured data. Communicate and write effectively. Ability to safely and appropriately handle and protect confidential information.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Analyze data and create user-friendly visual displays of that data to assist IOAI, Caltrans, and the public understand the meaning of the data. Errors in processing and visualizing the data could have major impacts to the perceptions and decisions made based on that data. Inaccurate information could result in missed leads for audits and investigations, incorrect assumptions and conclusions drawn for audits and investigations, and inaccurate reporting to Caltrans and the public.

PUBLIC AND INTERNAL CONTACTS

This position has regular contact with all levels of internal staff and external partners. Works with data owners and related program areas in order to understand the data.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent must be able to sit for long periods of time using a laptop, video display monitor(s), cell phone, keyboard, and mouse. The work may occasionally require bending, kneeling, and lifting up to 15 pounds. The incumbent may need to stand for long periods of time while presenting or facilitating. Requirements for this position include the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on short notice. The incumbent must be able to interact in a diverse workforce environment and work together in a cooperative and collaborative manner. The incumbent must comply with professional standards of conduct and adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' evolving telework policy. IOAI 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. All commute expenses to the headquartered location will be the responsibility of the selected candidate. The incumbent will work in a climate-controlled office and telework environment under artificial lighting. The incumbent may be required to sit for long periods of time using keyboard and computer.

While in the office, the incumbent will work in a climate-controlled office building under artificial lighting. There may be occasional fluctuations in building temperature. The incumbent will generally work between the hours of 7:00 am and 6:00 pm. Meetings or other events, such as public meetings or recruitment events, may occasionally require working hours other than those stated. Occasional travel related to the incumbent's duties which could require extended hours of work and/or overnight or multiple-day trips may be required.

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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.)

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