

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Research Data Specialist II	OFFICE/BRANCH/SECTION Division of Project Mangement	
WORKING TITLE Project Management Data Liaison	POSITION NUMBER 913-176-5758-911	REVISION DATE 07/02/2024

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 direction of a Supervising Transportation Engineer, the Office Chief of Project Management Application Systems (PMAS) in the Division of Project Management (PM), the incumbent performs a variety of tasks including the more independent, responsible, varied, and complex research, data analysis, and standard procedures for the Quality Management Reporting System (QMRS) data warehouse and the Project Change Request (PCR) database. These systems are the basis of the computer-oriented processes that support the project management tools that are used to develop and manage workload and schedules for all of the Capital Outlay Support (COS), including Broadband projects across the state. The incumbent will perform ad-hoc report development, conduct statistical work and analysis in efforts related to best data practices for coordinating more complex research with multiple Caltrans Divisions and Districts, partner agencies, researchers, and academics. The incumbent performs quantitative and qualitative data-driven research and conducts statistical work. The incumbent independently performs complex data analysis to assemble structured and unstructured data. The incumbent provides expert consultative services to senior departmental management on the impact, or potential impact of state operations, projects, or proposals related to PM and presents findings to Senior departmental management. The incumbent understands and conforms with policies, standards, and guidance from Caltrans Enterprise Data and Geospatial Governance while staying up to date on industry trends and applicable technologies such as scripting, security issues, authoring tools, graphic design tools, and new languages.

CORE COMPETENCIES:

As a Research Data Specialist 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. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Equity, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, Integrity)
- **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. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, 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. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, Integrity)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - 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. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation, Integrity)

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- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Innovation, Integrity)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
40%	E	Develop, maintain, and validate data within the QMRS data warehouse. Analyze and query data, organizing both structured and unstructured datasets. Coordinate statewide data initiatives in collaboration with various Offices, Divisions, Districts, and Partners. Conduct complex analyses and create data visualizations to forecast trends, ensuring quality assurance and providing necessary updates and training. Engage with Districts and Divisions to assess and address their data needs and requirements. Develop, update, and maintain QMRS data workflows. Define and create new data models and visualizations to meet information needs effectively. Develop reports to assist various novel programs including Broadband projects.
30%	E	Develop, maintain, and validate data within the PCR database. Analyze and query data, organizing both structured and unstructured datasets. Coordinate statewide data initiatives in collaboration with various Offices, Divisions, Districts, and Partners. Conduct complex analyses and create data visualizations to forecast trends, ensuring quality assurance and providing necessary updates and training. Engage with Districts and Divisions to assess and address their data needs and requirements. Develop, update, and maintain PCR data workflows. Define and create new data models and visualizations to meet information needs effectively. Serve as a technical Subject Matter Expert (SME) for the Office of Project Delivery and Workload Development on COS project data, including Broadband projects.
15%	E	Participate in QMRS and PCR strategic planning, implementation, and policy standard development.
10%	E	Coordinate complex research projects and deliver presentations at meetings with internal and external partners. Assist in the creation and maintenance of external partner contracts.
5%	M	Collaborate with Enterprise Data and Geospatial Governance and the Enterprise Data Warehouse to further development of best data practices at Caltrans.

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 not a supervising position but may serve in a lead capacity for data driven projects to complete tasks related to the assignment.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge: Knowledge of structured query language (SQL) and Project Delivery data is desirable, as well as data reporting and data visualization. A general knowledge of Caltrans' organization, departmental policies, project development process, and project management concepts is required. Also requires knowledge of organizational relationships and functions within Caltrans that pertain to the planning, design, construction, operation and maintenance of transportation facilities. Knowledge of project management standards including the Work Breakdown Structure (WBS) and Resource Breakdown Structure (RBS) are essential.

Abilities: Based on experience and expertise, must be able to exercise good judgment on matters relating to project management and capital program delivery. Must have the ability to coordinate effectively with all levels of management and employees, and the ability to communicate orally, in writing and with visual aids, and to conduct formal training classes for District personnel.

The Research Data Specialist is required to review and analyze of a wide range of policies, procedures and reports to draw conclusions leading to appropriate and timely recommendations.

The incumbent must have, or acquire within six months, the ability to find data in the Department's Project Management and Accounting systems and prepare basic reports. This requires the ability to read the several data sets within the QMRS Data Warehouse. These requirements will change as the QMRS incorporates new datasets from various Caltrans systems. On-line and individual training will be provided.

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Experience: Experience in project management and the project development process is preferred.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Inadequate consideration of relevant factors could result in inefficient use of public funds as well as a loss of credibility with public agencies and the public. In collaboration with others, incumbent must be capable of sound judgment and decision-making. Consequences could be increased liability, non-uniform policy interpretation, and unanticipated damage to the highway system and increased risk of jeopardizing the safety of the traveling public. Federal funding could be jeopardized if program requirements and/or commitments under the purview of this office are not met by the Department.

PUBLIC AND INTERNAL CONTACTS

The incumbent must interface and maintain continuing close contact and cooperative working relationships with Districts, Regions, and Headquarters personnel, management, and executive staff. Contacts will involve formal and informal communications with Deputy Directors, Division Chiefs, senior managers, and program staff. Collaboration with other Headquarters Executive Management and District staff will be required.

Establishment of close contacts and working relationships with outside agencies and organizations is also essential.

Incumbent will have occasional contact and must effectively communicate with the public, representatives of local, regional, State, and Federal agencies. External contacts may also involve formal and informal communications with other transportation stakeholders, and industry representatives on complex complete streets issues.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

This position requires periodic travel to the districts, an excellent state of mind, and the ability to make clear, timely judgments under pressure. It also requires teamwork to openly discuss issues and reach consensus. The position requires the ability to multi-task, adapt to changes in priorities and ensure completion of tasks or projects given short notice, develop new insights into situations, foster a work environment that encourages creative thinking and innovation; and to adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Incumbent must be able to develop and maintain cooperative working relationships. Incumbent must value cultural diversity and other individual differences in the workforce; be tactful and treat others with respect.

WORK ENVIRONMENT

Employee will work in a climate-controlled office under artificial light when not teleworking. Employees may be required to travel in state. Frequency of travel is expected to be very low.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans 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. Business travel may be required, and reimbursement considers an employee's designated headquartered 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.

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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

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