

State of California - Department of Social Services

DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION:

Research Data Analyst I

POSITION NUMBER:

800-661-5729-700

DIVISION/BRANCH/REGION: (UNDERLINE ALL THAT APPLY)

FAD/Financial Management Branch

BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY)

Fiscal Policy & Analysis Bureau/ Allocations

SUPERVISOR'S NAME:

David Rivas

SUPERVISOR'S CLASS:

Staff Services Manager I

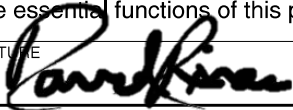
SPECIAL REQUIREMENTS OF POSITION (CHECK ALL THAT APPLY):

- ☐ Designated under Conflict of Interest Code.
- ☐ Duties require participation in the DMV Pull Notice Program.
- ☐ Requires repetitive movement of heavy objects.
- ☐ Performs other duties requiring high physical demand. (Explain below)
- ☒ None
- ☐ Other (Explain below)

I certify that this duty statement represents an accurate description of the essential functions of this position.

I have read this duty statement and agree that it represents the duties I am assigned.

SUPERVISOR'S SIGNATURE



DATE

03/12/2025

EMPLOYEE'S SIGNATURE

DATE

SUPERVISION EXERCISED (Check one):

- ☒ None ☐ Supervisor ☐ Lead Person ☐ Team Leader

FOR SUPERVISORY POSITIONS ONLY: Indicate the number of positions by classification that this position DIRECTLY supervises.

Total number of positions for which this position is responsible:

FOR LEADPERSONS OR TEAM LEADERS ONLY: Indicate the number of positions by classification that this position LEADS.

MISSION OF ORGANIZATIONAL UNIT:

The mission of the California Department of Social Services is to serve, aid, and protect needy and vulnerable children and adults in ways that strengthen and preserve families, encourage personal responsibility, and foster independence.

The Financial Management Branch is comprised of two bureaus: the Budget Bureau and the Fiscal Policy and Analysis Bureau. The Branch plays a key role in developing fiscal policy, working with the Department's core programs to develop the State Operations Budget, distributing funds to the 58 California counties for program administration, and completing the research and data analysis required for sound decision-making.

The Allocations Section is responsible for fund distribution and expenditure analysis to support overall program administration.

CONCEPT OF POSITION:

Under direct supervision of the Staff Services Manager (SSM I) I the RDA I will assist in the development of data driven projections and allocation methodologies using various internal and external data sources and will provide recommendations for improving current processes and procedures for data analysis and fund allocation. The RDA I will use a variety of research tools and techniques to provide technical assistance and analysis of related demographic and expenditure data, and assist in the identification of shifts and trends by analyzing and interpreting available data. The RDA I must be able to reason logically and creatively, exercise good judgment, and be able to effectively articulate and defend findings.

A. RESPONSIBILITIES OF POSITION:

Under the Direct supervision of the SSM I, the RDA I is responsible for conducting basic research, data gathering, scheduled report maintenance, and assisting with the compiling, maintaining and improving existing forecasting and allocation assignments, developing new forecasts and allocation methodologies, researching the availability, reliability and applicability of data/information, and developing and presenting ad-hoc data upon request. The RDA I serves as a liaison with CDSS program staff and will be required to present allocation methodologies and expenditure information to both internal and external stakeholders.

40% Utilizing structured and unstructured data from various reports and resources, assists in researching, analyzing, and interpreting expenditure and caseload data for the purpose of continuously improving existing expenditure projections and existing fund allocation methodologies. Performs scheduled report maintenance and assists in the compilation and analysis of expenditure and caseload trends over time. Using Microsoft Excel and other visual analytic tools, presents trend and regression analysis and proposed options for improving allocation methodologies and expenditure projections.

30% Assists in the development of new fund allocation methodologies. Conducts basic research and data gathering to inform decision makers of options for the distribution of funds to counties or other entities. Assists in developing the necessary tools for data collection using research and data analysis methods. This includes but is not limited to the development of data models, visual aids, and routine dashboards.

25% Assists in researching, analyzing, and interpreting allocation and expenditure data to respond to a variety of questions and hypothetical scenarios posed by State and County personnel and other stakeholders. Reviews and analyzes legislation, regulations, and policy initiatives. This includes, researching the availability of relevant data, and assessing the appropriateness of application to fiscal analyses. Assists in developing recommendations based on all the findings, and presenting to management, legislative staff, advocates and other stakeholders.

5% Performs other duties as needed pertaining to the Allocations Section.

B. SUPERVISION RECEIVED:

The RDA I receives direct supervision from a Staff Services Manager I, and is expected to work independently in the development and application of data analytics, research methodology, and visualization techniques.

C. ADMINISTRATIVE RESPONSIBILITY:

None.

D. PERSONAL CONTACTS:

The RDA I meets with the Financial Management Branch Chief and Bureau Chiefs as well as with other departmental managers and program partners. The RDA I meets with the County Welfare Directors association and interfaces with county fiscal representatives and other external stakeholders.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analysis and supporting information used to allocate departmental funds and monitor county expenditures in excess of \$30 billion annually. Failure to provide accurate research and data findings may negatively effect the provision of information needed to appropriately support state and federal programs, which may negatively effect the provision of services to needy and vulnerable clients, and could result in inappropriate over or under allocation of state funding.

F. OTHER INFORMATION:

The work created by the Financial Management Branch is confidential in nature until it has been published. As such, it is essential that the RDA I maintain a high degree of integrity and maintain departmental confidentiality.

State of California - Department of Social Services

DUTY STATEMENT**Vacant**

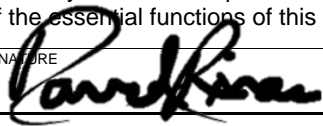
CLASSIFICATION: Research Data Analyst II (RDA II)	POSITION NUMBER: 800-661-5731-700
DIVISION/BRANCH/REGION: (UNDERLINE ALL THAT APPLY) Administration/Financial Management Branch (FMB))	BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY) Fiscal Policy & Analysis (FPAB)/Fiscal Analysis & Allocations
SUPERVISOR'S NAME: David Rivas	SUPERVISOR'S CLASS: STAFF SERVICES MANAGER I

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CONCEPT OF POSITION:

Under general direction of the Staff Services Manager (SSM I) the RDA II is responsible for performing financial oversight of the more complex fiscal issues as it pertains to local assistance funding and for research and developing data driven allocation methodologies using the various Departmental data sources that are available. It is essential that the RDA II provide the data analysis skills to improve processes and procedures, for allocations and 58-county data analysis.

The RDA II is responsible to analyze and explain data, and use a variety of analytical techniques to provide technical assistance and guidance in the analysis of related caseload and expenditure data, to determine shifts and trends by using and interpreting the data available. The RDA II must be able to reason logically and creatively.

A. RESPONSIBILITIES OF POSITION:

- 40% Plan, coordinate, and complete county administrative research projects which explore expenditure trends for the purpose of improving the Department's ability to predict future changes in county allocations and evaluate current allocation methodologies. Build the necessary tools for data collection using more advanced research and data analysis methods. This includes but is not limited to routine dashboards, performance evaluation reports, visual aids, and data models. Monitor county expenditures and trends over multiple years. Project and redirect funds if the county does not spend funds. Data compilation, analysis, and presentation in Microsoft Excel and other visual analytics tools to provide both trend and regression analysis.
- 20% Plans and designs study approaches, interprets findings, provides complex fiscal and caseload analysis (including historical data) and projections to calculate various impacts related to assigned program areas. This includes researching program assumptions, assessing economic, demographic, and social variables as well as program evaluation. Utilize statistical techniques. develop forecasts and trends, project and estimate future economic and program activities. The RDA II uses statistical and estimating models, confers with program and research staff, prepares structured, written fiscal instruction, and explains the recommendations to upper management and outside control agencies for the decision-making processes in order to implement programs and monitor county performance.
- 20% Functions as a lead expert to ensure the integrity of all allocation procedures by conducting research and data analysis on various allocation methods and developing more accurate data information systems, sources and studies designed to measure the fiscal impact and caseload of program activities. Identifies new innovative visualization techniques to develop new solutions to access and use data.
- 15% Reviews and analyzes the more complex and sensitive legislation, regulations, and policy initiatives. This includes, determining if there is any research data available that supports the Department's position and assessing the appropriateness of application to fiscal analyses. The RDA II is responsible in developing a recommendation based on all the findings, and present to executive directorates, control agencies, legislative staff, advocates and other stakeholders.
- 5% Performs other duties pertaining to the Allocations Unit.

B. SUPERVISION RECEIVED:

The RDA II receives general supervision from a Staff Services Manager I, but is expected to act with high degree of independence in the development and application of data analytics, research methodology and visualization and techniques in addition to the development of more in-depth analysis that includes, but is not limited to, counties, tribes, county probation departments, and realigned programs.

C. ADMINISTRATIVE RESPONSIBILITY:

None. However, the RDA II represents the Branch on multi-disciplinary teams and has primary responsibility for critical and sensitive projects and activities.

D. PERSONAL CONTACTS:

The RDA II meets with the Financial Management Branch Chief and Bureau Chiefs, as well as other departmental managers when working with program partners to review expenditure and caseload data analysis information for anomalies to better inform the review team. The RDA II interfaces with CWDA and county fiscal representatives as well as control agencies such as the Department of Finance, Health and Human Services Agency, as well as the Legislature, stakeholders, etc. The RDA II serves as a team lead, working closely with Staff Services Analysts and Associate Governmental Program Analysts in the Branch on various expenditure and caseload analyses.

E. ACTIONS AND CONSEQUENCES:

The Branch is responsible for the preparation of fiscal analysis and supporting information used to allocate funds and monitor county expenditures, which exceeds \$29 billion annually. Failure to provide the more advanced research and data findings may delay program necessary information to implement programs, which may delay services provided to clients.

F. OTHER INFORMATION:

The RDA II is expected to have good qualitative analysis capabilities and work in a team setting and/or lead capacity. The incumbent is expected to be familiar with quantitative and qualitative data-driven research and, statistical and forecasting techniques and the utilization of computer resources in the application of these techniques.

The work created by this Branch is confidential in nature until it has been published.