



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:

Agency: Department of Consumer & Business Services

Facility: Labor & Industries Building

[X] New [] Revised

This position is:

- [X] Classified
[] Unclassified
[] Executive Service
[] Mgmt Svc - Supervisory
[] Mgmt Svc - Managerial
[] Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

Form with fields a-j: Classification Title (Research Analyst 4), Classification No (C1118), Effective Date (September 1, 2024), Position No (7100.022), Working Title (Lead Analyst), Agency No (44000), Section Title (CSD- Information Technology & Research Section), Budget Auth No (1423051), Employee Name, Repr. Code (OAS), Work Location (Salem - Marion), Supervisor Name (Dan Palacios), Position (Permanent, Full-Time), FLSA (Exempt), Eligible for Overtime (No).

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Department of Consumer and Business Services (DCBS) is Oregon's largest business regulatory and consumer protection agency. The department administers state laws and rules to protect consumers and workers in the areas of workers' compensation, occupational safety and health, financial services, insurance and building codes.

DCBS consists of the Workers' Compensation Division; Oregon Occupational Safety and Health Division; Division of Financial Regulation; Building Codes Division; Small Business Ombudsman; and the Office of Injured Workers Ombudsman. The department provides shared services to all divisions through the Director's Office and Central Services Division. The department also provides shared services to the Workers' Compensation Board. DCBS employs 950 employees and has a biennial operating budget of approximately \$685 million.

The Information Technology and Research Section (IT&R) provides a broad range of specialized technical services in the areas of information systems, data analysis/dissemination, and computer/telecommunication services. The staff support the collection, processing, analysis, and dissemination of statewide and regional data about workers' compensation, accident prevention, insurance, financial institutions, corporate securities, and building codes. The section supports several critical systems to meet the regulatory requirements for each program and interact with other state and federal agencies.

Research Services provides policy research and analysis; survey design and administration; financial forecasting/modeling, actuarial studies; workload, revenue, and expenditure forecasts; data analysis; long-range information needs planning; ad hoc report generation; econometric modeling; complex research studies; decision support and management information report development; report writing; and consultations on research design, sampling plans, and other technical research activities.

DCBS has a complex computer environment which includes Oracle, Microsoft SQL Server, supporting Internet and client server applications, repository-based data and metadata, and users in a distributed computing environment. The DCBS computer environment has multiple remote locations. It is a mixed environment with LANs, desktops, and servers from multiple vendors. DCBS has a dynamic business environment that is subject to change.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Serve as project leader on Business Intelligence tools, services, and projects. Responsible for designing, implementing, and evaluating complex data models and applying complex analytical techniques and concepts to major research studies and statistical projects. Analyzes data and prepares comprehensive interpretative statistical reports. Consults with top-level agency management to interpret and explain research findings and how they relate to program issues. Examples include Premium Rate Ranking Study's, Workers' Compensation System Report, and Rate setting.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Ongoing			<ul style="list-style-type: none"> Perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully. Engage in effective team participation through willingness to assist and support co-workers, supervisors, and other work-related associations. Develop good working relationships with division and agency staff and supervisors through active participation in accomplishing group projects and in identifying and resolving problems in a constructive manner. Demonstrate openness of constructive feedback and suggestions, in an effort to strengthen work performance. Contribute to a positive, respectful and productive work atmosphere. Foster and promote the importance and value of a diverse, discrimination and harassment free workplace. Respect diversity of opinions, ideas, and cultural differences. Support outreach and diversity related efforts in order to diversity the workforce. Regular attendance is an essential function required to meet the demands of this job and to provide necessary services.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

30%	N	E	<p>Research Planning, Design, and Analyses</p> <ul style="list-style-type: none"> • Serves as project leader to plan, design, and implement major complex research studies and statistical projects to ensure the quality and applicability of the data provided. • Consults with and analyzes user needs to determine areas of research, methodology, purpose, and scope of projects. • Develops procedures to be used to conduct the study, including sample design, form design, data collection, and analysis methodology. • Determines and applies complex statistical analysis techniques, concepts and validity measures based on the assumptions and hypothesis in the research design. • Oversees the design of systems used to analyze and present data that may include writing code in R, SQL, or using other programming languages or analytical tools. • Consults with systems analysts to design department operational databases to communicate analytical decision support needs and data specifications, ensuring new and modified systems meet data capture and reporting requirements. • Combines extensive knowledge of other related research and trends in national and state data to arrive at valid conclusions and recommendations in support of agency and legislative decision making. • Presents study findings to agency management and policymakers, both orally and in writing. • Select software tools and develop techniques for applying these to complex analyses and reporting which will be used by their team and others in the agency. • Coordinates the development of the executive information resources for assigned program areas as information systems are enhanced or migrated to new end-user environments. • Collection and analysis of publicly available data as well as targeted data collection via survey. Data needs to be normalized and validated to prepare a multi-faceted comparison. • Coordinates the collection of data from numerous sources within DCBS, by numerous members of the research team, key staff and executives. • Leads in the analysis of historic revenue, changes in the regulated industries, changes within DCBS and other factors to create a projection of future revenue from a large number of DCBS programs. This analysis is done in collaboration with key stakeholders and research team and results in recommendations supporting executive leadership in determine the rate setting.
20%	N	E	<p>Technical Consultation</p> <ul style="list-style-type: none"> • Serves as technical consultant to top management, legislators, interest groups, and the media regarding impact of proposed changes in statute or rule, based on analysis of data or research findings. • Communicates findings orally and in writing in strategic planning sessions and public forums such as legislative hearings, community meetings, and conferences. • Makes policy recommendations based on sound analysis of available information. • Represents the agency as spokesperson on research matters concerning major issue analysis. Includes development and presentation of analysis to a various internal and external groups.

			<ul style="list-style-type: none"> • Acts as Subject Matter Expert for designated focus areas so that data can be accurately accessed and interpreted. • Develops and maintains roadmap for agency use of business intelligence including changes in software capabilities, user requests, and evolving best practices.
20%	N	E	Report Preparation <ul style="list-style-type: none"> • Prepares comprehensive interpretative statistical reports or articles for publication that include narrative analysis, tables, graphs and charts. • Writes in clear and concise language to explain complex concepts and findings in a manner that can be comprehended by the target audience. • Reviews and edits the written work of other analysts contributing to a project to ensure accuracy and clarity. • Trains and mentors other staff in report writing and presentation. • Analyzes, interprets, and reports on changes within their designated focus area and related Statewide and national trends.
15%	N	E	Research Project Management <ul style="list-style-type: none"> • Designs research project methodologies and develops plans and timelines for successful completion. • Coordinates the activities of other analysts including assigning, monitoring, and reviewing their work. • Participates in activities related to determining decision support need requirements. • Evaluates business intelligence software capabilities and provides guidance in using software for project success. • Trains other analysts and program staff in data warehouse procedures, design principles and technology. The ultimate usefulness and ease of access to department decision support information will be determined by the quality of these activities.
10%	N	E	Data Stewardship <ul style="list-style-type: none"> • Mentors business areas on data stewardship concepts and responsibilities, and assists research analysts on their role in the effective management of data to ensure its quality, accessibility, and security. • Manages access to the agency's data, using tools like data sharing agreements. Ensures those who do have access can get what they need when they need it utilizing tools like the open data portal (data.oregon.gov) • Actively works to ensure the agency's data is accurate and kept up to date so that decision makers have the most complete understanding possible. • Reviews data requests related to assigned business information. • Reviews (or proposes), and implements processes to ensure data quality and internal controls. <ul style="list-style-type: none"> • Assesses the quality of data. • Resolves data issues. • Maintains business rules and data definitions. • Coordinates changes to the meaning of data. • Understands and follows DCBS best practices related to data stewardship. • Responds to special information requests as assigned.
5%			Other duties as assigned
100%			

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Professional office environment, including frequent desk work with computer/monitor/mouse. Position often requires meeting short, inflexible timelines and conflicting priorities due to the diverse needs of requestors. Limited physical exertion. Flexible work schedule as approved by the Research Manager.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- DCBS mission and goals
- IT&R mission and goals
- DAS and DCBS policies and procedures
- DCBS management expectations
- Workers' Compensation and Safety & Health Law (ORS 656 and 654), Administrative Rules, and Bulletins.
- Computer manuals, statistics and economic textbooks
- SEC-02, Information Management Policy

Data Stewardship References:

HIPAA (Health Insurance Portability & Accountability Act), Public Records laws (ORS 192.501), Juvenile Information Protection Act, Rehabilitation Act Section 508 (ADA), Credit card standards, DAS IRMD Security Guidelines, HB. 3839 (Keep electronic funds transfer data private), E-SIGN, Oregon Digital Signature Law, Consumer privacy (in financial services).

b. How are these guidelines used?

The mission and goals guide expected outcomes and associated projects required to support the mission and goals.

Policies, procedures, expectations, and contacts establish expected behaviors for both the employee and their co-workers.

Laws, rules, and procedures are used generally to interpret data and insure consistency.

Computer manuals and textbooks are used as technical references in planning research studies.

The Policies listed above describe the data steward role in managing DCBS systems and data. The Data Stewardship References describe requirements and issues that should be considered by a data steward to properly manage data for which they are responsible.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Management Staff	Person/Phone/Writing/E-mail	Provide Technical consultation and information.	Daily
Agency Program Staff	Person/Phone/Writing/E-mail	Provide/request information; resolution of data management issues, and IT project issues.	Daily
IT&R Staff	Person/Phone/Writing/E-mail	Plan/coordinate studies, system development.	Daily
Outside Data Users	Person/Phone/Writing/E-mail	Provide information, clarify needs. Present research outcomes.	Daily
Other Jurisdictions' Administrative Agencies	Person/Phone/Writing/E-mail	Obtain data.	Monthly
Legislators, Employers, Unions	Person/Phone/Writing/E-mail	Communicate information. Provide research findings.	Occasionally

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Research planning and design decisions such as priority of projects, cost/benefit, methodology, etc. Affects efficient use of limited resources; quality of decisions made by legislators, director and other interested parties. Can have major impact on the effectiveness of DCBS initiatives. Proper design of research studies is key to the integrity of the information provided.

Legislative decisions such as proposing legislative alternatives, recommending changes, responding to inquiries and testifying. Major impact on workers' compensation benefits and costs, insurance delivery, and financial institution and corporate security regulations.

Technology decisions Participates in discussions on system design for new and existing systems, such as data warehouse software and hardware, end-user query tools and decision support applications. Proper system design is key to the integrity of information and affects the productivity of users. Affects efficient use of information resources, staff access to information, staff productivity, and decision making.

Policy planning decisions in concert with program areas where data analysis is key to the decision or implementation, and also within IT&R. Affects overall efficiency and effectiveness of IT&R and the Department.

Data Stewardship decisions, with guidance from the divisions, approves or denies access to data; informally identifies changes that should be made to a data system(s), and informally identifies processes necessary to ensure data quality and internal controls. Poor decisions can have significant impact to the Department's business operations, its liability exposure, and its reputation.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Research, Analysis, and Statistics Manager 2	7100677	Verbal and Visual Review	As Needed	Work products are reviewed for conformance to standards, clarity, accuracy, and pertinence of logical decision

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 9. OVERSIGHT FUNCTIONS THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? _____
 How many employees are supervised through a subordinate supervisor? _____
- b. Which of the following activities does this position do?
- | | |
|--|---|
| <input type="checkbox"/> Plan work | <input type="checkbox"/> Coordinates schedules |
| <input type="checkbox"/> Assigns work | <input type="checkbox"/> Hires and discharges |
| <input type="checkbox"/> Approves work | <input type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input type="checkbox"/> Gives input for performance evaluations |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> Prepares & signs performance evaluations |

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position is eligible for remote work on a part-time basis once the incumbent has gained the proficiency to perform work independently. However -- regular, scheduled office hours are also required.

This is a vital role to IT&R given the scope of responsibility, independence, skill set required, agency impact and protection of investments. Someone filling this position will need to have these proficiencies or be able to attain them in a reasonable timeframe.

Ability to:

- gather, compile and analyze research data.
- present reports and summaries in tabular, graphic and pictorial form.
- speak and write effectively for a wide range of audiences.
- use statistical software to edit, tabulate or simulate statistical data.
- evaluate research results specific to a single specialization and understand its implications to other fields, areas of the Department.
- understand the nature and value of available data, and adjust for data issues.
- construct data sets to best achieve the theoretical research objectives.

General knowledge of:

- computer applications for data analysis

Extensive knowledge of:

- research design, and computer concepts, applications and programming languages.
- data analysis.

Special Requirements:

Position is subject to a criminal background check.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
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Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority Signature

Date