

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Associate Governmental Program Analyst (AGPA)	OFFICE/BRANCH/SECTION District 11 - SR-76/I-5 Corridor	
WORKING TITLE Project Manager Assistant	POSITION NUMBER 911-208-5393-xxx	EFFECTIVE DATE

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the general direction of the Staff Services Manager I, and with lead direction and guidance from a Transportation Engineer (Range D), the Project Manager Assistant (PMA) function consists of providing assistance in the management of funding and programming of District capital projects to Project Manager(s) on more complex projects. The incumbent will independently perform the more responsible, varied and complex, professional-level analytical and technical support to develop, administer, and monitor each phase of the funding process. The incumbent will provide professional expertise while working with local, Federal, and other governmental agencies to secure and track funding for the various eligible District projects.

After two years in this assignment, the incumbent may be rotated to another AGPA position within the District.

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	<p>Assist the Project Manager in the management of a broad range of project management duties. These duties consist of scheduling, budgeting, and various analytical tasks. Collect project-planning information to prepare draft project work-plans; assist in the production of cost-benefit and earned value analysis; provide critical path analysis; and other project control activities. Prepare project management reports, correspondence, and documentation. Gather, retrieve, interpret, report, and provide recommendations on programmed, planned and actual project data on Transnet program projects. Using various computer applications Enterprise Financial Information System (EFIS), Project Resource and Schedule Management (PRSM), and Transportation Accounting Management System (TRAMS), the incumbent is required to electronically retrieve project specific expenditures and projections and update and monitor project work-plans and work agreements. In addition, gather programmed, allocated, and expended funding for all capital project phases by various criteria: fund type, fiscal year, contributor, and category. There may also be costs associated with external agreements such as cooperative, utility, railroad, and highway improvement agreements that may need to be included.</p> <p>Identify and locate other critical information that resides in various capital outlay project databases that would be critical to successfully reporting on the Transnet program. The products produced shall be financial and project management reports, charts, and graphs. Multiple presentation methods will be used to communicate effectively to the broad audience requiring this information. The information will also be used to make regional programming decisions and request Federal and Local project approval.</p>
20% E	<p>Analyze project expenditures and projections against budget and coordinate any needed financial changes for the assigned corridor with the Project Manager. This will include participating in the annual Capital Improvement Plan (CIP); updating process, Regional Transportation Improvement Program (RTIP) programming cycles, Federal Financial Plans, and Transportation Commission reports.</p>

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| 15% | E | Apply accurate and quality project business rules related to project budgeting and programming including project splits and combines, program codes, project expenditure authorization, and project management databases. |
| 10% | E | Take the lead in special projects by using funding databases, the Internet, and outside resources. Prepare a complete and accurate document for management presentation purposes. |
| 15% | M | Communicate effectively with the Project Managers, external clients such as San Diego Association of Governments (SANDAG) Program Managers, financial staff, and citizen advisory groups regarding a project's programmed cost, scope, and schedules on a regular basis. |

ESSENTIAL 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, but may act in the lead capacity in financial and project management process issues over less experienced staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Technical Knowledge:

Knowledge of personal computers, Outlook, Microsoft Word, Excel, Oracle, and PowerPoint programs, California Transportation Improvement Program System (CTIPS), EFIS (American Management Systems & InfoAdvantage), Internet, Intranet, Office of Engineering Database, PRSM, Adobe Acrobat, Process/Program knowledge, business math, calculation of percentages, averages, expenditure projections.

Incumbent must know project management concepts, and knowledge of the overall project development process is required to the extent that the raw data reviewed can be conceptualized into project milestones, activities, and goals.

Time management skills are critical on multiple levels. Data required will come from a multitude of sources that must arrive prior to the report deadline. The incumbent must also manage the sources of the data to the point that they can be assured of receiving critical information. This will require the incumbent to be knowledgeable about other work that these sources (often other managers) must meet. The ability to prepare technical correspondence and comprehensive reports, charts, graphs, and other visual aids is necessary.

Abilities:

Deadlines for the incumbent will be weekly, monthly, and quarterly. The incumbent must be able to schedule tasks in order that each sequential, supporting deadline will be met on time and within the highest degree of accuracy. The incumbent should be able to work independently while exercising good judgment and independent initiative. Accuracy is vital to this position. Incumbent must be able to validate and perform their own quality assurance to the products they produce.

Incumbent must have knowledge of the cumulative impact of expenditures on a project budget. With a finite amount of project resources available each minute change, overrun, or poor estimate will have an aggregate effect that can be damaging to project financing and Caltrans' external integrity.

Teamwork:

The ability to work productively and collaborate with staff across all divisions, all professional groups, management, external agencies and their staff cannot be overstated.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent will be responsible for performing work to a high degree of accuracy. All reports produced will be used both internally and externally. Inaccurate information can result in negative publicity for both Caltrans and SANDAG. Errors of omission regarding data can be catastrophic to the financial backbone of the Transnet program. Much of the program is being financed with "borrowed money." Accurate figures allow the correct amount of dollars being borrowed

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for the correct amount owed. Understated reports will result in not enough money being available while overstated reports will result in the opposite.

PUBLIC AND INTERNAL CONTACTS

This position requires frequent communication with project and functional managers throughout the district as well as local agencies and headquarters staff.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent is required to operate a PC workstation and various software applications, filing, phone communications, and other office-related duties. He/she should be able to concentrate, focus intently and analyze complex data sets, and respond appropriately in a busy office environment. He/she may be required to handle several issues at a time and should be able to prioritize tasks as necessary. He/she must grasp technical information, formulate effective strategies and then communicate those complexities in a manner that is well understood by the receiver of the information. Deadlines will at times be short; for some staff this may create stress. The incumbent must possess effective, non-disruptive ways of dealing with stress and complete assignments accurately and efficiently.

Consistent, predictable attendance is a job requirement.

The incumbent should be able to develop and maintain productive work relationships. Basic civility and consideration shall be extended to all contacts and co-workers.

This position may require independent travel for State business.

WORK ENVIRONMENT

The base of operation will be in the District Office. While in the office setting, he/she will be working in a climate-controlled environment with artificial lighting. Multi-floor buildings are equipped with elevators and stairs. Work environment includes constant interaction with a diverse group of customers and co-workers. This position may require sitting for long periods of time while typing.

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