STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Governmental Program Analyst (AGPA)	12/Systerm Planning-Travel Forecasting- Freight Mobility	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Resource Planning Analyst	912-820-5393-xxx	01/05/2015

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 supervision of the Branch Chief, a Senior Transportation Planner, the Associate Governmental Program Analyst (AGPA) is responsible for all aspects of budget planning and management. Organizes all administrative functions for the Planning Division including managing personal service dollars and operating expense dollars from various funding programs; fiscal analysis, personnel, business management, review of planning and engineering documents, preparing external correspondences, and complex, comprehensive discussion with external agencies on planning issues. Provides program leadership in the areas of policy analysis, research agenda development, and planning program issues. Directs development of initiatives for continuous improvement in the cornerstones of Quality Assurance/Quality Control for Department management strategies (i.e., Program Review).

This includes planning, developing, coordinating, and managing of strategic and performance plans, budget formulation and execution, customer service, and administrative services. Duties involve dealing directly with the Division management and executive staff, headquarters, district resource management, budget personnel and external partners. The critical functional areas of the position include budget formulation, policy analysis, policy development, administrative supporting services, financial allocation, resource management, strategic planning, transportation planning programs and contracting procedures.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M)[1]	Job Description
45%	E	Incumbent will work directly with the District Planning Deputy and Branch Chiefs to provide necessary assessment of resources and financial support by developing strategies and techniques to maintain, and monitor the Division's personnel resources. This includes responsibility for the formulation of policies, procedures and decisions to implement, monitor, improve, and maintain a Planning Division budgeting Personal Service Dollars program. By utilizing the results from the Department's Enterprise Resource Planning Financial InfraStructure (E-FIS) Advantage & InfoAdvantage financial systems and Microsoft Excel, the incumbent will create, prepare, and forecast Fund, Program, Category, and Object budgetary expenditure reports to provide accurate, real-time, resource expenditure recommendations to management. Provides operating direction on analysis of productivity, effectiveness of strategy, and specific approaches used in implementing the Transportation Planning, Local Assistance and Advance Planning Programs. Incumbent will plan, manage and monitor the Division's budget resources and provide recommendation to Management to be in conformance to State and departmental policies and objectives. This involves developing strategic plans based on program categories guiding the quantitative and qualitative evaluation of the program and operations of the Division. Provides guidance and recommendations on the conduct of evaluation studies of tactical planning, execution, and operating management to improve the coordination of services and other duties prescribed for the Deputy Director of Planning. Develops reports for each of the functional areas and formulates recommendations based on findings to serve as the basis for new administrative systems, processes, policies and guidelines, and/or regulations. Administers consultant contracts, including processing invoices, assisting in new consultant selection, preparing performance evaluations, grading contract changes, contract extensions, and other related tasks to ensure high quality documents. Develops, reviews, evaluates, implements, and coordinates the policies and procedures regarding transportation programs and processes.

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20%	E	Incumbent will perform analysis of existing and proposed legislative, regulations, and policy issuance of State and Federal (Federal Highway Administration, US Department of Transportation, and other Federal agencies) by assessing its merits to the Department's goals and objectives to recommend necessary actions for management to ensure the Division takes an appropriate position on transportation planning and local assistance related issues. Exercise significant responsibility over program activities to include performance planning, strategic planning and program planning and development. Incumbent will analyze state and federal laws, regulations, and standards to develop recommendations on best practices to assist in aligning Division's efforts within the Planning management team. Incumbent will be responsible for ensuring Division compliance in meeting Title VI requirements, Conflict of Interest Statements, and other mandated programs.
15%	E	Act as the lead administrative contact to represent the division in meetings with Budgets, Agency Telecommunications Representative (ATR) and Human Resources; contact person with headquarters Planning, Local Assistance, Mass Trans and Project studies regarding allocation and expenditure issues. Develop the annual Planning Division Activity Plan based on initial District allocations. Prepare Planning Staffing Plan based on discussions with Headquarters and Branch Chiefs. Identify any issues and make recommendations for final reconciliation. Discuss the plan with Budgets to determine sub-allocation of resources based on district wide needs. Once approved continue to effectively administer the program positions and make recommendations to management to adequately maintain staffing level and recommend strategies to maintain balance between staffing and workload.
5%	M	Incumbent is assisting for maintaining and reconciling data (including positions, allocations, program type, vacancies and salary HR duties) in various databases related to other personnel management. These include Position Tracking Automated System (PTAS) report and other personnel information management information systems and the Planning Division's organizational chart. Prepares and reviews all Division personnel/staffing transactions, including preparation of Position Action Request Form (PARF) packages for submittal to Budgets Office. Coordinates with necessary internal division to review employee Duty Statements to ensure all requirements are met, and information is complete and accurate. Closely monitors the expenditures of the Division as a function of the baseline plan and production and provides the results to the Division branch chiefs. Recommends changes or alternative control methods as needed. Perform other administrative duties critical to the Division. Incumbent will provide assistance for confidential and sensitive assignments, such as providing assistance and support to the seniors for timely processing of employee development and disciplinary documentation forms, files and records. The incumbent exercises independent judgment in the release of confidential and sensitive information. Ensure Division compliance in meeting Title VI requirements, Conflict of Interest Statements, and other mandated programs.
5%	M	The incumbent will assist, support, and develop Caltrans outreach and partnership initiatives with small businesses to evaluate potential for strategic coordination that will benefit local communities.
5%	M	Incumbent will coordinate and facilitate the development of internal events and public outreach activities for various politically sensitive issues/projects for public or inter-agency workshops, conferences and meetings. Responsibilities will include coordination and development of program agendas, support staff, on-site and off-site location logistics, speaker needs, logistics, acquisition of facilities, services appropriate to the event (including webinars, video and teleconferences). The incumbent will take meeting minutes.
5%	M	Involved with handling operating expenses including but not limited to communication devices and services, travel approvals, travel arrangements, office supplies/IT equipment and license agreement procurements, inventory and maintenance and processing administrative paperwork.

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The incumbent will be a CalCard holder for the Division and will follow all state protocols, including responsibility for the secure retention of records.

[1]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.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of District activities, policies, the entire Caltrans organization, sensitive issues, and lines of District delegation are required. Incumbent must be able to organize his/her own time, analyze constantly shifting workload and set priorities to meet strict deadlines. He/she must exercise a high degree of initiative and independent thinking, give and follow instructions with precision and competence, and will be expected to interpret and implement new policies or procedures with a minimum of instruction or explanation. Requires the ability to work effectively in different situations and adapt to a variety of conditions.

Essential skills include tact, discretion and mature judgment in contacts with District employees, including managers, headquarters staff, representatives of federal, State and local agencies, elected officials, and the public. General work qualities required for this position include the ability to consistently exercise good judgment, analyze situations accurately, good facilitation skills and the ability to run effective meetings, and take effective and timely action. Must work independently, recognizing when and how to follow through appropriately. Incumbent will require good organizational skills to work efficiently with frequent interruptions.

Also required, knowledge of business principles and modern methods of public and business administration to include: fiscal and personnel management, budgetary procedures and purchasing; principles of modern office methods, forms, and equipment; public information channels and methods; organization and functions of the Department of Transportation; general knowledge of data analysis and processing using personal computers, including word processing and databases/spreadsheets; methods and techniques of effective team or conference leadership. Knowledge of the Departments' accounting and procurement systems such as Enterprise Resource Planning Financial InfraStructure (EFIS) and, Procurement Card Accounting Reconciling System (PCARS); data management such as Program Resource & Scheduling Management (PRSM); and use of Microsoft Office.

Analytical skills to identify and assess administrative problems, draw logical conclusions, and adopt an effective course of action are required. Must reason logically and creatively. Will be relied upon to exercise good judgment; communicate efficiently and effectively, both orally and written; effectively manage time by establishing priorities; handle multiple tasks and meet deadlines; be able to carry out administrative research, to gather, tabulate and analyze statistical data, and present it in an understandable, usable form to resolve complex administrative or governmental problems.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

This position requires contact with issues or material extremely confidential or sensitive in nature. Discretion must be maintained at all times.

The incumbent determines where calls/visitors, correspondence, etc., should be referred, as well as who is responsible to take the required action. The incumbent uses considerable judgment in providing factual information in response to numerous inquiries. Mistakes could cause poor public image for the District and/or department due to lack of proper response and delay in action. Consequence of error in any aspect of the incumbent's responsibilities would have a serious effect on the department's operations and credibility.

Poor judgment and analysis could affect budgeting, personnel management and general work activities, adversely effecting the operation and function of the Division, or could cause delays to and create poor working relations with other departmental units and/or agencies.

PUBLIC AND INTERNAL CONTACTS

This position has continuous and extensive contact with departmental staff of various levels, up to and including, the top levels of executive management. The incumbent will have frequent contact with representatives of federal, State and local agencies, elected officials, outside vendors, contractors, and the general public. The employee must deal with situations in a courteous and professional manner.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent will be performing tasks that include typing/keyboarding, filing, phone communications and other office-related duties. Therefore, the incumbent should have good manual dexterity, and should be able to sit, stand, bend, stoop, kneel and do light lifting without difficulty. Sites inspections and event attendance will be performed through the use of a state vehicle.

Incumbent should be able to concentrate, analyze the situation at hand, and respond appropriately in a busy office environment. He/she may be required to handle several issues at the same time and should be able to prioritize tasks as necessary.

The incumbent must be able to develop and maintain cooperative work relationships and should have the ability to handle all work-related relationships with internal and/or external contacts in a professional and courteous manner.

WORK ENVIRONMENT

The base of operation will be in the District Office. While in the office setting incumbent will be working in a climate-controlled environment with natural and artificial lighting. Multi-floor buildings are equipped with elevators and stairs.

Incumbent will be required to travel to small business and public meetings and trainings as required.

Incumbent may be exposed in stressful situations and will be required to operate various office business machines and electronic devices.

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