

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
SENIOR TRANSPORTATION ENGINEER, SPECIALIST	D44/Project Management/Prog. Delivery & Workload Devel.	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Project Data Management District Liaison	913-176-3161-XXX	07/01/2015

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 direction of the Office Chief, Project Delivery and Workload Development, a Supervising Transportation Engineer, the incumbent serves as a liaison for one or more districts, is responsible for developing and maintaining Capital Project Delivery reports, and supports the maintenance of project data contained in capital project management systems used for reports and analysis. This includes Project Resource and Schedule Management (PRSM), AMS Advantage (EFIS), California Transportation Improvement Program System (CTIPS) and the Earned Value Reporting System (EVRS). These systems are the basis of the computer-oriented processes that support the project management tools used to develop and manage workload and schedules on all Capital Outlay Support (COS) projects statewide. Knowledge of the principles of project management, the project development process, and capital and support cost estimating are necessary. Specific duties and activities include, but are not necessarily limited to:

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
25% E	Serve as a technical Subject Matter Expert (SME) for the Office of Program Delivery and Workload Development on COS' project management engineering systems and processes. Use technical transportation engineering expertise to perform tasks pertaining to the successful monitoring and delivery of the statewide COS portfolio of projects including: <ul style="list-style-type: none"> • Establishing and monitoring baseline project scope, cost, and schedule in PRSM, including verifying project budgets by reviewing engineering documents, cooperative agreements, CTIPS data and Project Change Requests (PCRs), and checking schedules for valid logic; • Authorizing (opening & closing) project phases in E-FIS and PRSM. This process includes, but is not limited to, approval of BGE94 and CAS/CAM documents, cross-referencing project authorization, workplans, budget information, cooperative agreements, federal funds eligibility, PCRs for splits/combines, funding authorization, program codes, and fund codes; • Performing high-level quality control/quality analysis of statewide COS project engineering data; • Using CTIPS, Cooperative agreements, PCRs, PRSM, and Oracle SQL Developer to verify and validate existing and proposed baseline schedules, project budgets, and major milestones.
20% E	Execute advanced queries of relational databases utilizing SQL Developer. Develop ad hoc reports regarding budget, engineering effort, and expenditures that provide management with a fluent and concise presentation of findings. Communicate with District Project Management staff to identify and resolve data anomalies. Provide analysis of Capital Outlay project costs and schedule performance measures, such as support-to-capital ratio, phase durations, project delays, and workload histograms and trends. Use analyzed engineering data to create and present information to Caltrans management, external agencies, and the public regarding the COS portfolio of transportation engineering projects.
20% E	Proactively review and analyze engineering project data in PRSM, CTIPS, AMS, FMIS and other databases to ensure the quality of data used for project delivery reporting and workload projections. Cooperatively work with other office staff, divisions in Headquarters, and the districts to correct inaccurate, obsolete or inconsistent project-related data.
10% E	Develop ad hoc reports and provide analysis of Capital Outlay project costs and schedule performance measures, such as support-to-capital ratio, labor cost rates, phase durations, project delays, and workload histograms and trends.

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

10%	E	Identify need for PCRs and STIP/SHOPP amendments. Track project budgets and expenditures and identify projects that are anticipated to exceed allowable thresholds. Monitor progress relative to planned delivery schedule and identify major milestones with projected delivery outside the planned fiscal year.
5%	E	Assist in the preparation, monitoring, and reporting of the Contract for Delivery and Annual Delivery Plan. Coordinate with District contacts to ensure that the Contract for Delivery and Annual Delivery Plan are timely, accurate, and achievable, and risks are documented and managed.
5%	E	Assist in the development of multi-year project workload projections to be used as the foundation for the Capital Outlay Support budget. Provide analysis of workload to ensure it is consistent with Department policies and procedures and industry best practices. Assist in the development of reports, spreadsheets, charts and graphs for the analysis of project workload.
5%	E	Develop improvements to current project delivery policies, business practices, manuals and other guidance documents.

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

The incumbent does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge: A general knowledge of Caltrans' organization, departmental policies, project development process and project management concepts is required. Also requires knowledge of organizational relationships and engineering 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.

Knowledge of the Department's accounting systems, practices, policies and procedures 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 communicate effectively with all levels of management and staff orally, in writing, and with visual aids.

The incumbent is required to review and analyze 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 prepare advanced reports and queries using data from various databases, execute and modify database programs, and prepare summary reports. On-line and individual training will be provided.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for independent action and initiative in carrying out assigned duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate actions. Poor decisions may result in (1) inaccurate representation of project data, (2) loss of credibility with decision makers, or (3) the development of inaccurate recommendations on which others rely.

PUBLIC AND INTERNAL CONTACTS

The incumbent must interact with Project Managers, District Budgets units, Program/Project Management Support Units and HQ units, including but not limited to Divisions of Accounting, Budgets, and Transportation Programming. The incumbent must work cooperatively and effectively in a team environment with District, Division of Engineering Services and Headquarters staff. The incumbent must also prepare and make presentations to Headquarters and District managers as required.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee will be required to sit for long periods of time using a keyboard and video display terminal, develop and

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

maintain cooperative working relationships, and focus for long periods of time. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

WORK ENVIRONMENT

Employee will work in a climate-controlled office under artificial light. Employees may be required to travel in state. Frequency of travel is expected to be very low.

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

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
SENIOR TRANSPORTATION ENGINEER, SPECIALIST	D44/Project Management/Prog. Delivery & Workload Devel.	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Project Data Management District Liaison	913-176-3161-XXX	07/01/2015

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 direction of the Office Chief, Project Delivery and Workload Development, a Supervising Transportation Engineer, the incumbent serves as a liaison for one or more districts, is responsible for developing and maintaining Capital Project Delivery reports, and supports the maintenance of project data contained in capital project management systems used for reports and analysis. This includes Project Resource and Schedule Management (PRSM), AMS Advantage (EFIS), California Transportation Improvement Program System (CTIPS) and the Earned Value Reporting System (EVRS). These systems are the basis of the computer-oriented processes that support the project management tools used to develop and manage workload and schedules on all Capital Outlay Support (COS) projects statewide. Knowledge of the principles of project management, the project development process, and capital and support cost estimating are necessary. Specific duties and activities include, but are not necessarily limited to:

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
25%	E	Serve as a technical Subject Matter Expert (SME) for the Office of Program Delivery and Workload Development on COS' project management engineering systems and processes. Use technical transportation engineering expertise to perform tasks pertaining to the successful monitoring and delivery of the statewide COS portfolio of projects including: <ul style="list-style-type: none"> • Establishing and monitoring baseline project scope, cost, and schedule in PRSM, including verifying project budgets by reviewing engineering documents, cooperative agreements, CTIPS data and Project Change Requests (PCRs), and checking schedules for valid logic; • Authorizing (opening & closing) project phases in E-FIS and PRSM. This process includes, but is not limited to, approval of BGE94 and CAS/CAM documents, cross-referencing project authorization, workplans, budget information, cooperative agreements, federal funds eligibility, PCRs for splits/combines, funding authorization, program codes, and fund codes; • Performing high-level quality control/quality analysis of statewide COS project engineering data; • Using CTIPS, Cooperative agreements, PCRs, PRSM, and Oracle SQL Developer to verify and validate existing and proposed baseline schedules, project budgets, and major milestones.
20%	E	Execute advanced queries of relational databases utilizing SQL Developer. Develop ad hoc reports regarding budget, engineering effort, and expenditures that provide management with a fluent and concise presentation of findings. Communicate with District Project Management staff to identify and resolve data anomalies. Provide analysis of Capital Outlay project costs and schedule performance measures, such as support-to-capital ratio, phase durations, project delays, and workload histograms and trends. Use analyzed engineering data to create and present information to Caltrans management, external agencies, and the public regarding the COS portfolio of transportation engineering projects.
20%	E	Proactively review and analyze engineering project data in PRSM, CTIPS, AMS, FMIS and other databases to ensure the quality of data used for project delivery reporting and workload projections. Cooperatively work with other office staff, divisions in Headquarters, and the districts to correct inaccurate, obsolete or inconsistent project-related data.
10%	E	Develop ad hoc reports and provide analysis of Capital Outlay project costs and schedule performance measures, such as support-to-capital ratio, labor cost rates, phase durations, project delays, and workload histograms and trends.

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

10%	E	Identify need for PCRs and STIP/SHOPP amendments. Track project budgets and expenditures and identify projects that are anticipated to exceed allowable thresholds. Monitor progress relative to planned delivery schedule and identify major milestones with projected delivery outside the planned fiscal year.
5%	E	Assist in the preparation, monitoring, and reporting of the Contract for Delivery and Annual Delivery Plan. Coordinate with District contacts to ensure that the Contract for Delivery and Annual Delivery Plan are timely, accurate, and achievable, and risks are documented and managed.
5%	E	Assist in the development of multi-year project workload projections to be used as the foundation for the Capital Outlay Support budget. Provide analysis of workload to ensure it is consistent with Department policies and procedures and industry best practices. Assist in the development of reports, spreadsheets, charts and graphs for the analysis of project workload.
5%	E	Develop improvements to current project delivery policies, business practices, manuals and other guidance documents.

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

The incumbent does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge: A general knowledge of Caltrans' organization, departmental policies, project development process and project management concepts is required. Also requires knowledge of organizational relationships and engineering 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.

Knowledge of the Department's accounting systems, practices, policies and procedures 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 communicate effectively with all levels of management and staff orally, in writing, and with visual aids.

The incumbent is required to review and analyze 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 prepare advanced reports and queries using data from various databases, execute and modify database programs, and prepare summary reports. On-line and individual training will be provided.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for independent action and initiative in carrying out assigned duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate actions. Poor decisions may result in (1) inaccurate representation of project data, (2) loss of credibility with decision makers, or (3) the development of inaccurate recommendations on which others rely.

PUBLIC AND INTERNAL CONTACTS

The incumbent must interact with Project Managers, District Budgets units, Program/Project Management Support Units and HQ units, including but not limited to Divisions of Accounting, Budgets, and Transportation Programming. The incumbent must work cooperatively and effectively in a team environment with District, Division of Engineering Services and Headquarters staff. The incumbent must also prepare and make presentations to Headquarters and District managers as required.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee will be required to sit for long periods of time using a keyboard and video display terminal, develop and

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

maintain cooperative working relationships, and focus for long periods of time. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

WORK ENVIRONMENT

Employee will work in a climate-controlled office under artificial light. Employees may be required to travel in state. Frequency of travel is expected to be very low.

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