

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION District 1 - Transportation Planning	
WORKING TITLE Planning Administrative Liaison	POSITION NUMBER 901-800-5157-001	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 supervision of the Chief, Local Assistance (a Senior Transportation Engineer), the incumbent is responsible for the analysis and tracking of various Planning & Local Assistance budgetary and program expenditure issues. Incumbent will monitor District 1 Planning Management program's administrative requirements and procedures to ensure compliance.

**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
50%	E	Assist in the monitoring the PID's Program. Collect and analyze Planning and Local Assistance budgetary information, coordinate budget reports and report program expenditures. Verify and analyze data to determine future expenditures and project Year End balances to provide recommendations on potential budgetary shortfalls for personal service and operating expenditures. Maintain a tracking system to produce a variety of status and quarterly reports including, but not limited to, budgetary and personnel resource reports for future personnel issues and trend analysis. Serve as single point of contact and address requests from the District Budgets Office and HQ Planning. Serve as an information resource regarding proper charging procedures for Planning and Local Assistance staff. Develop and maintain tracking systems for analysis of performance of various programs.
20%	E	Maintain effective and efficient communications with external and internal agencies for the Planning and Local Assistance staff by continually developing ways to facilitate and enhance communication between Planning, Local Assistance and partners. Identify problems that may require initiation of policy or procedure changes and recommend resolution. Update and maintain contact databases. Prepares draft and final correspondence, reports and other various planning products and memorandum. Coordinate internal and external meetings, training, workshops and other planning activities. Provide new content for the District 1 Planning website and other electronic communications tools and develops other written and other visual displays.
10%	E	Assist in the hiring process for new staff. Assist in scheduling and organizing interviews. Under the guidance or direction of a lead, prepare Position Action Request Forms (PARF) packages for Transportation Planning unit. Attend to new staff requirements and aid in the transition of new personnel.
10%	E	Assist in preparing Purchase Requests. Verify purchases are received and ensure payments are made promptly and in accordance with Department policies, procedures and regulations. Utilize computer spreadsheets and paper records, and other resources to maintain Planning purchase requests file, reconcile VISA/CALCARD statements. Assist in developing and monitoring acquisition process to improve system efficiencies in Planning purchases. Monitor inventory of office supplies and equipment. Provide support to Planning and Local Assistance staff on supplies needed and basic IT workspace setup.

## POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

---

- |    |   |   |
|----|---|---|
| 5% | M | Assist in coordinating meetings for the Planning staff. Attend training and meetings as needed. Assist Planning staff with public meeting setup and preparation, as well as attend the meetings in a support role as needed.                                    |
| 5% | M | Provide support to staff in travel processes such as coordinate calendars, prepare travel expense claims (TEC) and other documents in accordance with Department policies, procedures and regulations for Deputy and other Planning and Local Assistance staff. |

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

Must have a thorough knowledge of fiscal and personnel management principles, practices and trends; administrative analysis; budgetary procedures including purchasing and budget monitoring; modern office methods, forms and equipment; organization and functions of the department.

Must be able to reason logically and creatively using analytical techniques to resolve complex problems; work both independently and cooperatively as part of an interdisciplinary team. Must be able to analyze data and present ideas; communicate effectively both verbally and in written form; prioritize workload and manage multiple tasks while completing assigned tasks accurately and on time. Ability to develop and maintain a positive working relationship with internal and external partners.

Must have a working knowledge of computer applications and software, including but not limited to, Microsoft Windows, Excel, Word and Outlook.

---

### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Failure to do job successfully could result in a significant loss of funding for the department or agencies with whom we work. Failure to relate or interpret information correctly could result in loss of time and effort and effective use of funds.

---

### PUBLIC AND INTERNAL CONTACTS

Contact with local and regional agencies, their staff, and the public. Contact with other functional units within the Planning Division, District 1, North Region, Federal Highway Administration (FHWA), and the Division of Local Programs in Sacramento.

---

### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for extended periods of time using a personal computer and while attending meetings. Incumbent must be congenial and tactful when dealing with others and must be able to develop and maintain cooperative working relationships. Must be self-motivated and be able to multitask, adapt to changes in priorities and complete tasks or projects with short notice. Travel may be required.

---

### WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial lighting. The incumbent may be required to travel, to work outdoors and to be exposed to dirt, noises, uneven surfaces, and/or extreme heat or cold.

---

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.)

# POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

---

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