

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION D3/North Region Division of Right of Way	
WORKING TITLE Division Admin. and Federal Coordinator, P & M	POSITION NUMBER 903-400-5157-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 close supervision of Senior Right of Way Agent, the incumbent performs varied administrative duties involved in the Right of Way Planning and Management function. Incumbent performs basic aspects of contract management for District title and escrow contracts and managing open escrows. Assist as federal aid coordinator for Right of Way Support to ensure District Right of Way receives federal aid for support on qualifying projects and that federal aid is utilized under authorized guidelines. Assist in coordinating, developing, implementing and managing a training plan for North Region (NR) Right of Way. Through Advantage, incumbent is responsible to procure, goods and services as needed in support of Division needs.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
25%	E	<p>Under lead guidance and direction, assists the Senior Right of Way Agent in managing the North Region (NR) Right of Way (RW) Title and Escrow Contracts. Coordinates requests from RW Agents and external divisions to receive contracted products and services through title companies. Monitors budget for each contract. Conduct ongoing analysis of expenses against each project and anticipated expenses for each project against project budget and total budget contained within the respective title and escrow contract. Maintain District ledger for title and escrow expenditures and reconcile weekly via Headquarter's Weekly Monitoring Report.</p> <p>Encumber District Title and Escrow contracts through EFIS/Advantage and process invoices for payment. Track open escrows and resolve outstanding issues working closely with Division and District staff and contractor to ensure successful completion. Monitor title and escrow encumbrances via the HQ Encumbrance report and at each Fiscal Year end, roll unexpended Title and Escrow encumbrances into the next Fiscal Year to aid in HQ allocation management.</p> <p>Assist in developing new Requests for Proposals and work with the Division of Procurement and Contracts to obtain and implement new title and escrow contracts.</p>
15%	E	<p>Under lead guidance and direction, assists the Senior Right of Way Agent in acting as the District point-of-contact in regards to Federal eligibility for phase 2 project support costs. Process phase 2 federal aid request using the FADS system and submitting an E-76 to obtain federal authorization for projects meeting such criteria.</p> <p>Utilizing Advantage, review procedures and verify accuracy of coding and federal aid data on all RW encumbrances and expenditure transactions related to Federalization of phase 2 support dollars. Work with HQ staff interpret policy and ensure District compliance.</p>
15%	E	<p>Under lead guidance and direction, assists the Senior Right of Way Agent in acting as the RW Project Control Coordinator. Serves as District coordinator for phase 2 project opening and closing in EFIS/Advantage, support management's creation of annual region wide operating expense budget, to include monitoring and providing regular projections on estimate at completion. Open and close project 2 phase and close project 9 phase for District 3 RW in EFIS/Advantage. Modify initial phase 2 funding profiles, as requested by Project Managers, RW management and other authorized stakeholders. Perform final vouchering and EA closure analysis and reports. Enter</p>

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status in regional database.

- 10% E Under lead guidance and direction, assists the Senior Right of Way agent in acting as the NR RW Training Coordinator. Work with NR RW Seniors to determine training needs for staff and develop annual NR training plan to meet training needs. Submit annual NR Training Plan to Headquarters RW. Work extensively with Headquarters staff to develop strategies to meet and implement training. Develop tracking system for staff training; maintain training management system. Ensure Division compliance with all mandatory training. Assist RW Seniors in developing internal training curriculum for their functions and incorporate into office procedural documentation. Utilize Advantage to procure any needed goods and services.
- 10% E Under lead guidance and direction, assists the Senior Right of Way Agent in acting as the RW Equipment Coordinator. Determine and monitor status of NR RW Information Technology (IT) needs, and request and monitor acquisition of IT related goods through the Information Technology Acquisition Plan. Utilizing Advantage, procure any needed goods and services.
- Under lead guidance and direction from the Senior Right of Way Agent, performs facilities management for District 3 by coordinating cubicle and office moves with the NR Facilities Division including moving equipment, phones and ensuring compliance with approved reasonable accommodation requests. Develop and maintain equipment databases. Coordinate periodic inventories of equipment conducted by IT and CAD.
- 5% E Assists the Assistant Chiefs for North Region and Region Planning and Management Senior annually to develop the annual operating expense budget and implement budget tracking by providing Quarterly expenditure tracking reports to management.
- 5% E Serves as back-up for supplies ordering for District utilizing CAL-Card and EFIS/Advantage. Work with staff and management to ensure office needs are met in a timely and cost effective manner while in compliance with all State purchasing requirements.
- 5% E Serves as back-up for making capital payments through Advantage. In the absence of the Capital Payments Coordinator or under heavy workload, assist with processing capital payment for project acquisition and permit needs to ensure timely payment to grantors.
- 5% E Under lead guidance and direction from the Senior Right of Way Agent, acts as the SCOPE Account Manager. Request accounts and update accounts from Headquarters as needed ensuring security requirements are met to protect data integrity. Maintain log of accounts throughout NR Right of Way.
- 5% M As needed, participate in Regional Planning and Management and Hot Topic meetings, attend District Computer Users Group (CUG) meetings, attend Project Control meetings/teleconferences, work on special projects, and provide general support to office and perform other duties as required.

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

None.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must have general knowledge of State administrative procedures and Right of Way procedures and good knowledge of Planning and Management procedures. Must have the ability to independently gather and analyze data, reason logically, make appropriate recommendations and develop solutions to budgetary and Planning and Management problems. Incumbent must have good organizational and computer skills; the ability to work with a variety of

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Management computer database systems including software such as Microsoft Access and Excel. Must possess ability to handle multiple priorities and work in a team environment, while working closely and efficiently with others. Incumbent must have the ability to develop and implement new and revised procedures.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Responsible for current and reliable knowledge of title and escrow contracts, federal participation in projects and OE Budget. Consequences of failure in this responsibility can result in the failure to project delivery needs and failure to meet financial obligations. This could disrupt community plans and statewide funding and planning schedules, and could also result in loss of funding, additional project, program cost, and loss of Federal participation.

Incumbent is responsible for accurate data entry into various data systems. Failure to keep various data systems updated correctly and provide accurate reports as required could result in management making bad decisions or reporting inaccurate information to Headquarters and possibly to the California Transportation Commission. This could result in considerable additional work to make corrections and could adversely impact affected transportation projects.

PUBLIC AND INTERNAL CONTACTS

Contact with all levels of management, co-workers, Headquarters Right of Way, other organizations, and the general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May require sitting for prolonged periods while analyzing both printed and electronic data.

Physical requirements include ability to: file, use various types of copy and facsimile equipment, sit for long periods of time using a keyboard and display terminal, and work in a climate controlled office building under artificial lighting.

Mental requirements include the ability to: Be flexible. Ability to develop and maintain cooperative working relationships, and remain calm, patient, and professional when dealing with the public and others on sensitive issues.

Handle and respond to multiple tasks with ever changing priorities, processes and workload fluctuations. Maintain sustained and focused attention to detailed, complex and varying assignments in a busy work environment.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial lighting in a workstation within an open floor plan, cubicle type office environment.

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.

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SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE
