

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst (SSA)	OFFICE/BRANCH/SECTION District 5 Administration	
WORKING TITLE	POSITION NUMBER 905-001-5157-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 supervision of an SSM I, the incumbent will: gather, tabulate, organize and analyze data for property control, budgeting, procurement and contracting activities. This will include but not be limited to property inventory, requisition requests, credit card purchases and documents for District 5 service contracts, commodities and equipment. Coordinate, maintain and report on the District 5 Property and Facilities budget allocations and expenditures.

Provide technical guidance in a wide variety of administrative activities in the Facilities Branch. Prepare and provide accurate reporting to the Supervisor, a Staff Services Manager I.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
30%	E	Assists with asset management functions for District 5 as required by State and departmental rules and regulations, including the State Administrative Manual, and the Caltrans Property Control Manual. Analyze and interpret official State and departmental asset management rules, regulations, policies, and procedures in order to formulate, document and administer property control, asset disposal, and asset inventory management processes and business practices for District 5. Continuously reviews and improves processes and business practices as they pertain to property control. Serves as the subject matter expert and statewide liaison with the Division of Procurement and Contracts, the Division of Information Technology, and Department of General Services as applicable. Recognizes and understands that the policies and procedures for each of these Divisions differ from District to District and to Headquarters. Participates in statewide teleconferences and provides analysis, alternatives, and recommendations for development of District 5 and departmental property control. Provides consultation, analysis, and recommendation to District 5 management and staff on asset management issues, processes, and business practices. Provides direction and oversight to District Property Liaisons who administer and coordinate asset management functions for their respective subdivisions. Communicates property control and asset management processes and business practices to District employees in writing and orally, and maintains all pertinent information through the District 5 Property Database as well as other storage methods.
30%	E	Assists with inventory reconciliations (monthly, annually, and/or every 3 years) as mandated and/or required, for all official asset inventory records, and in some instances conducts physical inventory of specific assets. Researches, evaluates, and resolves discrepancies and ensures that assets are added, transferred, or removed from the official departmental inventory record as appropriate. Prepares and provides reconciled inventory reports as mandated, required or requested. Provides feedback and recommendations for improvement of the tracking tools for District 5 asset management. Uses the District 5 asset tracking system to record, reconcile, transfer, monitor usage and assign each individual asset. Oversees receiving new assets and coordinates return, recycle, disposal or survey of old or underutilized assets.
25%	E	Assists with the preparation, review and evaluation of bid proposals for procurement to make recommendations to the Facilities Manager. Initiates requisition requests and credit card purchase documents for Facilities commodities and equipment. Performs analysis to evaluate the appropriate approvals and documents required. Verifies acquisitions are in compliance with special purchasing delegation from Department of General Services (DGS) and the State

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Administrative Manual (SAM). Utilizes the DGS BidSync to obtain vendor and statewide contract information. Initiates contract proposals, bid invitations and advertisements. Gathers proposals, monitors the selection process and corresponds with bidders once selections are made. Writes contracts and requisition requests, secures contractor's signature, secures internal approvals, prepares transmittal, monitors process through department and control agencies to final approval and execution under the Contract Delegation Purchase Orders. Interview requesters and analyzes pertinent data to ensure requested contracts are appropriate and in compliance with Labor Relations. Manages and maintains service contract requests. Evaluate and monitor all encumbrances and recommend to Facilities Manager when appropriate to disencumber unnecessary contracts and purchases. Prepares and analyzes budget expenditure reports for the Facilities Unit.

- 10% E Assists with the management of excess/surveyed equipment warehouse and determine whether property can be reused. Manage surplus property sales and maintain appropriate records through appropriate Property Survey Report Approvals. Completes special assignments, projects and drills, as requested. Serves as subject matter expert and consultant to District Property Liaisons. Manages excess and surveyed equipment warehouse and determine whether property can be reused. Manages surplus property sales and maintains appropriate records through appropriate Property Survey Report Approvals.
- 5% M Assists with the monitoring of District building security access and provide security access to buildings for new employees to District 5. Take Caltrans identification badge photos and provide updated identification badges to employees when needed.

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. Provide guidance to District 5 Property Liaisons in various other functional areas.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must be able to analyze and interpret policies and agreements, and be able to develop and implement new and revised procedures; maintain accurate records; take action independently. Must have the ability to work closely and effectively with others and be able to communicate clearly, both orally and in writing, as well as, have the ability to research, analyze and compile information into comprehensive and complete reports. The incumbent must be able to assimilate and evaluate technical and procedural input from various sources, develop alternative courses of action and make objective recommendations on all issues relating to this position.

Must work cooperatively and develop good working relationships with other District staff, Headquarters and vendors; have the ability to make logical decisions.

The incumbent should possess excellent analytical and writing skills. Must be able to plan, organize and prioritize work independently with minimum supervision. Ability to use good judgment and interpersonal skills to ensure that Caltrans is effectively represented to the public. Should possess ability to work on a keyboard, utilize computer programs such as Microsoft Word, Excel and Access to their full capacity. Must have knowledge and experience or the ability to learn and use several on-line and personal computer programs such as: AMS Advantage, info Advantage, and DGS statewide purchasing network. Ability to provide customer service to staff, management and outside consultants.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for developing and administering the District 5 Facilities asset management procedures, management procedures, and business practices, consistent with State and departmental rules, regulations, policies and procedures; developing processes and controls to maintain an accurate inventory of District 5 assets; and reconciling departmental property control records and responding to audit findings related to District 5 assets. Asset management is

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required by State and departmental rules and regulations, including the State Administrative Manual and the Caltrans Property Manual.

PUBLIC AND INTERNAL CONTACTS

The incumbent has frequent contact with management and staff throughout District 5 as well as Headquarters staff. It is expected that these contacts will be handled with professionalism at all times and gain and maintain the confidence and cooperation of those contacted during the course of work.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard/mouse and video display monitor, or while attending meetings. Must be able to use fine manipulation and/or simple grasping during the course of the workday. Some walking may be required. May be required to lift and/or move objects weighing up to 25 pounds.

Must be able to effectively communicate and may be required to make presentations, lead workshops, and serve on quality teams. Must be able to sustain the mental activity needed to conduct necessary research, analysis, reasoning, auditing and editing, problem solving and report creation and writing.

Must be able to organize and prioritize large volumes of varied documents. The workload is subject to frequent, substantial and unexpected changes. Must be able to utilize a personal computer to update, retrieve and analyze information.

This position requires the incumbent to be flexible and adaptable to changing policies, rules and regulations. The incumbent must be able to develop and maintain cooperative, collaborative working relationships with staff as well as other departmental employees and recognize emotionally charged and/or sensitive issues and problems and handle them appropriately with effective solutions.

WORK ENVIRONMENT

While at the base of operation, the incumbent will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Must be able to sit and/or stand for extended periods of time. Will use a keyboard/mouse and video display monitor for extended periods of time. Some travel may be required, therefore, the incumbent must be able to travel using a car or commercial transportation. May be exposed to dirt, noise and uneven surfaces.

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
