

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE STAFF SERVICES ANALYST (GENERAL)	OFFICE/BRANCH/SECTION ADMINISTRATION	
WORKING TITLE ADMINISTRATION SUPPORT ANALYST	POSITION NUMBER 908-032-5157-	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 manager of Business Management, a Staff Services Manager II, the Staff Services Analyst performs a variety of analytical duties and provides administrative support to Administration Division, including Contract Manager duties. A positive attitude and commitment to providing quality customer service that is accurate and timely is critical to the Administration function.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
35%	E	Assists the manager of the Office of Business Management in identifying the needs of the assigned units of the Office of Business Management. Independently analyzes the less complex needs and develops related service contracts and purchase orders. Researches the requirements of the services to be performed and drafts the contract language. Develops detailed descriptions of services and scope of work. Communicates with various vendors to acquire price quotes for services or needs. Facilitates arrangement of meetings with vendors and various technicians that provide services to the district. Creates Purchase Order Request (RQS) and Contract (CT) documents via the Advantage database from Enterprise Resource Planning Financial Infrastructure (E-FIS). Submits required documents to Department of Procurement and Contracts (DPAC) to ensure contracts are executed. Reviews and analyzes CT documents created by DPAC via E-FIS to ensure the terms of the contract are correct and the funding information is accurately coded. Reviews and analyzes Agreement Summary (STD-215) and Standard Agreement (STD-213) for accuracy to ensure they coincide with the terms of the contract and data entered into E-FIS, and provides recommendation for the resource manager to sign the documents. Monitors the progress of contracted vendors to ensure work is completed timely and according to the scope of work identified in the contract. Serves as a district contact for Business Management to resolve issues that arise with DPAC in regards to executed contracts with assigned vendors. Interprets and applies the departments policies and procedures for purchasing and contracting, and the Small Business Enterprise (SBE) utilization policy and procedures.
35%	E	Responsible for managing an assigned budget to ensure purchases and contracts are within the allocated amount. Reviews and analyzes contract invoices to ensure the department is being billed correctly. Interprets and applies the departments invoice dispute policy and procedures, and works with the contractor and Accounting to resolve any discrepancies. Processes invoice payments by submitting paper receiving records to accounting or creating Receiver (RC) documents utilizing the E-FIS Accounting software. Monitors submitted RC documents or receiving records to ensure invoices are paid in the allotted time. Maintain spreadsheets to record invoice payments and ensures contracts do not overrun. Analyzes executed contracts for funding and time requirements and applies the department's policies and procedures for amending contracts. Develop and submit amendment documents to DPAC when necessary. Works with Accounting to disencumber any remaining dollars on contracts that have been completed.

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- 25% E Assists the District Records Officer on the protection and preservation of vital records such as historical maps, as-built plans, contracts, etc. Provides guidance to District management to ensure that proper records management practices are utilized in accordance with State mandate. Identifies and adheres to appropriate retention schedules which meet the needs and the audit and legal requirements of the department. Consults with Headquarters and District managers to develop a Vital Records Protection Program that identifies vital records and backup, makes recommendations and implements economical and efficient storage. Directs the control, microfilming, and retrieval of contract and as-built plans, maps, photographs, etc., for inter-departmental, claims/legal functions, other governmental agencies, the public, and private sector use. Applies the departments policy and procedure for properly classifying, referencing, and micro-filming records. Authorizes the receipt, transfer, retrieval, and destruction of records in the State Records Center and the District. Provides customer service to internal and external customers.
- 5% M Provide back-up administrative support for the division of Administration (i.e., District Cashier, Training, Mailroom, and Map Files).

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

The incumbent must have the ability to interpret and edit written material; write effectively; analyze written and numerical data accurately, and follow oral and written instructions. In addition, incumbent must have the ability to express ideas in a clear, concise manner either verbally or in writing. Knowledge of various personnel-related principles and practices, and examination policies and procedures is essential. The incumbent must possess the ability to accept increasing responsibility and complete all tasks/assignments accurately and thoroughly; develop and maintain cooperative working relationships with all levels of staff; and be able to apply a plan of action in evaluating situations. Able to maintain confidentiality, skillfully organize and maintain different types of information, and accurately manage multiple tasks and handle time sensitive material within designated time frames. Knowledge of computer applications programs such as MS Office (Outlook, Word, Excel); modern office methods, supplies, and equipment such as scanners, copy machines, and printers. Knowledge of various filing systems and techniques.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Independently performs administrative work and ensures compliance of various administrative requirements; responsible for taking independent action and must exercise initiative in carrying out assigned duties.

Poor decisions could result in the loss or delay of an employee's pay and benefits, which could cause a hardship to the employee. This could also preclude the employee from using or cause the employee to experiencing a delay in using health and dental benefits in the event of an emergency. Erroneous decision-making in the examination process could result in compromising the integrity of the exam. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the Division of Human Resources (DHR) reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS

Independently communicate with all levels of staff and public both verbally and in writing. Must develop and maintain good working relationships with internal and external customers.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: Requires manual dexterity to use a computer for preparation of correspondence. Must be able to sit for prolonged periods of time to use a computer, keyboard, monitor and telephone; possess ability to move up to 35 pounds.

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Must have ability to sustain walking for extended periods of time.

Mental: Must be able to sustain mental activity to prepare correspondence, solve problems, formulate solutions and initiate appropriate actions; possess mental ability to respond logically and calmly to irate customers. Possess a positive, customer-service oriented attitude. Employee must be self-motivated and work independently and as a team player. Must be punctual and maintain good attendance.

Emotional: Must be able to develop and maintain cooperative working relationships; handle challenging situations in a calm manner. Must have the ability to multi-task, adapt to changes in priorities, complete tasks within limited time frames.

Must possess sufficient strength, ability, endurance and sensory ability to perform the duties contained in this duty statement with or without a reasonable accommodation.

WORK ENVIRONMENT

While at the base of operations, employee will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperatures may fluctuate. Employee may also be required to occasionally travel to the post office.

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
