

POSITION DUTY STATEMENT

PM-0924 (REV 06/2013)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION Caltrans/D10/PPM/Project Management Support Unit	
WORKING TITLE Project Analyst	POSITION NUMBER 910-100-5157-XXX	EFFECTIVE DATE

As a valued member of the Caltrans team, you make it possible for the Department to improve the mobility across California by being innovative and flexible; reporting to work as scheduled; working cooperatively with team members and others; and treating others fairly, honestly and with respect. Your efforts are important to each member of the team as well as those we serve.

GENERAL STATEMENT: (BRIEF SUMMARY OF THE MAIN PURPOSE AND FUNCTIONS OF THE POSITION. DESCRIBE THE SUPERVISORY RELATIONSHIPS INCLUDING THE CLASSIFICATION OF THE SUPERVISOR OR MANAGER TO WHOM THE INCUMBENT REPORTS. WHEN APPROPRIATE, IDENTIFY THE NEED FOR ANY CREDENTIAL OR LICENSE SUCH AS A DRIVERS' LICENSE.)

Under the general supervision of the Project Management Support Unit (PMSU) Branch Chief, with specific tasks assigned by a Project Manager (PM), the Project Analyst (PA) performs the duties of the team expert on project schedule and resources by providing accurate and timely information to the multifunctional Project Development Teams (PDT) and management and assists the PM in the delivery of the Districts Capital program. This includes assisting, monitoring, and providing recommendations for improvements for all phases of the projects, beginning with Project Initiation Document (PID) through completion of the Construction Contract. The incumbent must have extensive knowledge in the use of computer applications, work breakdown structures, and processes related to the planning, scheduling and the status of projects in support of project management goals and objectives. The incumbent must also be able to manage multiple projects simultaneously, work independently to analyze and recommend solutions and/or improvements. Incumbents may also be required to travel occasionally, and may be required to work overtime during cyclical and/or peak periods.

TYPICAL DUTIES: (BRIEF DESCRIPTION OF IMPORTANT DUTIES. RELATED DUTIES MAY BE GROUPED TOGETHER. USE ADDITIONAL SHEET IF NECESSARY.)

Percentage Essential (E)/Marginal (M) ¹	Job Description
60% (E)	The incumbent assists the PM to develop, modify, maintain, and analyze project resource needs. Provides detailed resource analysis of each project for Estimates to Completion (ETC) and Estimate at Completion (EAC) to the Project Manager and the PDT. Participate with the PDT and the PM in review, analysis, and evaluation of expenditure data; recommend allocation adjustments to the team; research and respond to the project resource requests, incorrect charging practices and direct or re-direct resources to accomplish project delivery. Coordinating and integrating communication with Functional Units, Task Managers and leading the Project Development Team through all phases, Project Initiation through Project Closeout. This includes and is not limited to, developing and processing Project Workplans, Risk Management Plans, Communication Plans, Financial Plans/Reports, Change control Documents, and various other documents. Maintaining Quality Control and Quality Assurance throughout Project Initiation, Development, Construction, and Closeout process. Has direct responsibility for assisting the PM manage project scope, schedules, and cost for both project capital and support costs estimates and providing updates. Managing and coordinating internal and external projects activities. Work independently to develop, analyze, and interpret project data such as cost and schedules or resource allocations to identify possible conditions that may jeopardize project delivery and provide assistance and recommendations to the PM for necessary actions. Managing and coordinating project internal and external activities. Incumbent has the ability to resolve conflict by identifying project concerns and issues in a timely manner, managing them and/or elevating if unable to resolve directly. Establishing and maintaining open and clear communication. Presenting yourself in a professional and courteous manner to both our internal and external partners while providing outstanding customer service. Providing timely and accurate information about the project status to functional managers on a regular bases. Providing District Management with timely and accurate information regarding project status on an as needed basis, including schedules and costs of project.
20% (E)	Assist Project Manager to develop and document information to be included in draft correspondence, reports, minutes and fact sheets. Respond to urgent requests from the headquarters and District Management by immediately researching, gathering and analyzing the project information. Schedule all project related meetings, reserve rooms and equipment, prepare invitations and draft agenda, set up displays and equipment and record meeting notes. Initiate process and monitor Project Management documents (Project Change Request, Database Certifications, Resource Update Reports, Workplan Requests, support cost estimates, project schedules, XPM input sheets), distribute to function units, and monitor progress throughout from approval through completion.

POSITION DUTY STATEMENT

PM-0924 (REV 06/2013)

- 15% (E) Perform more difficult or complex special assignments or studies requested by management. Prepare and/or coordinate the production of special statistical reports, charts or graphs in support of the Programming and Project management Division. Develop training materials and assists with the presentation of Programming Project Management training needs. Then incumbent may serve in a lead capacity performing such tasks.
- 5% (M) Perform more difficult or complex special assignments or studies requested by management. Prepare and/or coordinate the production of special statistical reports, charts or graphs in support of the Programming and Project management Division. Develop training materials and assists with the presentation of Programming Project Management training needs. Then incumbent may serve in a lead capacity performing such tasks.

¹ 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

This position is non-supervisory, however, the incumbent may be called upon to act in the absence of the supervisor for short periods of time.

KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS

Incumbent must have detailed knowledge of Caltrans' organization, department policies and procedures, the project development process, programming process, project management concepts, and engineering that pertain to the planning and design of transportation facilities. Incumbent must be able to independently interpret internal and external project information and offer solutions to management and the division, prepare technical correspondence and complete comprehensive reports for District Management and headquarters. Must be able to effectively communicate orally and in writing with persons at all levels of HQ Management, District, Region and external groups and must be able to apply and communicate this knowledge effectively on a consistent basis.

The incumbent must have a thorough understanding of the Department's requirements to deliver projects on schedule and within budget. This understanding must include a sound technical knowledge of the requirements of other functional units involved in the project development process. Incumbent must also have the ability to plan and organize work, and must work effectively and efficiently with others towards a common goal of project delivery within scope, cost and schedule.

The incumbent analyzes engineering estimates, PID scope proposals and programming documents for applicable information. Ability to analyze information for appropriate chagrining, scheduling and scope is necessary. The incumbent must have thorough knowledge of the entire project delivery process including the required interfacing with local agencies and the public and must possess the ability to anticipate technical issues and potential concerns with each project. The incumbent must also be able to analyze and interpret allocation and expenditure documents and be able to extract resources information from the capital project work plans as well as from expenditure reports.

The incumbent must have the ability to effectively use PC-based software programs for presentation or database purposes. A working knowledge of Project Resource Schedule Management (PRSM) and Open Workbench (OWB) software programs. Experience extracting, evaluating and analyzing large quantities of data from various sources. Strong analytical skills and experience to evaluate existing processes and recommend process improvements.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for exercising a wide degree of initiative in carrying out duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate action when managing project delivery issues. Incumbent must be able to anticipate problems and identify issues that may affect proposed scope, project delivery and/or cost including capital outlay support costs. Errors, poor judgement, or failure to recognize and communicate critical issues could result in missed deadlines, misuse of resource allocations, delay or lack of project delivery, loss of programmable funds and damage to the District's working relationship with our customers.

PUBLIC AND INTERNAL CONTACTS

The incumbent may attend public meetings. The incumbent will work with functional unit teams.

POSITION DUTY STATEMENT

PM-0924 (REV 06/2013)

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent works independently and as part of a team.

WORK ENVIRONMENT

The incumbent works in an office setting but may also participate in field reviews.

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
