

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION Caltrans/D10-Program and Project Management	
WORKING TITLE Project Analyst (Entry Level)	POSITION NUMBER 910-100-5157-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 general supervision of the Project Management Support Unit (PMSU) Branch Chief, with specific tasks assigned by a Project Manager (PM), the Project Analyst acts as a source of information on project schedule and resources by providing accurate and timely information to the multifunctional Project Development Teams (PDTs) and management and assists the PM in the delivery of the District's Capital program. This includes monitoring the schedules and resources of multiple projects 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 knowledge in the use of computer applications, work breakdown structures, and processes related to the planning, scheduling, and statusing of projects in support of project management goals and objectives. The incumbent must also be able to monitor multiple projects simultaneously, work independently to analyze and recommend solutions and/or improvements. Incumbent may be required to travel occasionally and may be required to work overtime during cyclical and/or peak periods.

**TYPICAL DUTIES:**

Percentage Essential (E)/Marginal (M) <sup>1</sup>	Job Description
50% E	Assists PM in developing, modifying, maintaining, and analyzing project resource needs. Assists PM in providing detailed resource analysis of each project for estimates to completion (ETC) and estimate at completion (EAC) to the PM for the PDT. Researches and responds to the project resource requests, incorrect charging practices, and directs or redirects resources to accomplish project delivery. Coordinates and integrates communication with functional units, task managers and the PDT throughout all phases of the project, from Project Initiation through Project Closeout. This includes and is not limited to working with the PM to develop and process project work plans, risk management plans, communication plans, financial plans/reports, change control documents, and various other documents. Assists PM to maintain quality control and quality assurance throughout the project initiation, development, construction and closeout process. Assists the PM in managing project scope, schedules, and cost for both project capital and support cost estimates, and provides updates. Assists PM to develop, analyze, and interpret project data such as costs and schedules and resource allocations to identify possible conditions that may jeopardize project delivery, and provides assistance and recommendations to the PM for necessary actions. Assists PM in managing and coordinating project workplan activities. Establishes and maintains open and clear communication. Presents in a professional and courteous manner to both our internal and external partners while providing outstanding customer service. Provides timely and accurate information about the project status to functional managers on a regular basis. Provides District management with timely and accurate information regarding project status on an as needed basis, including schedules and costs of project.
40% E	Assists PM to develop and document information to be included in draft correspondence, reports, minutes, and fact sheets. Responds to urgent requests from HQ and District management by immediately researching, gathering and analyzing project information. Schedules all project related meetings, reserves rooms and equipment, prepares invitations, drafts agenda, gathers additional supporting documents, sets up displays and equipment, and records meeting notes. With assistance from PM or journey level Project Analyst, initiates, processes and monitors project management documents (Program Change Requests, funds requests, route slips, database certifications, resource update reports, work plan requests, support cost estimates, project schedules, and PRSM input sheets), distributes to functional units, and monitors progress from approval through completion.

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5%	M	With assistance from PM or journey level Project Analyst, and often under short notice, performs special project-related assignments or studies requested by management.
5%	E	Travels to off-site meetings and project field trips and assists with presentations and taking notes.

<sup>1</sup>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.

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### SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None.

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must have knowledge of Caltrans' organization, departmental policies and procedures, the project development process, programming process, project management concepts, and engineering that pertains to the planning and design of transportation facilities. Must be able to independently interpret internal and external project information and offer solutions to management and the division.

Incumbent participates in project discussions in various formats, including PDTs, and demonstrates proficiency recording and processing professional meeting minutes in a timely manner, from draft to finalized version. Also responds to and initiates project-related communication with representatives of various internal divisions as well as external partners. Must possess ability to create, edit, and review professional-style correspondence, including emails, letters and memos.

Incumbent must have knowledge of the Department's requirements to deliver projects on schedule and within budget. This understanding must include knowledge of the requirements of other functional units involved in the project development process. 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.

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

Incumbent must have the ability to effectively use PC-based software programs for presentation or database purposes. Must be proficient in the use of Microsoft Word and Microsoft Excel. Must have a working knowledge of Project Resource Schedule Management (PRSM) and Open Workbench (OWB) software programs and experience extracting, evaluating and analyzing large quantities of data from various sources. Must have strong analytical skills and experience to evaluate existing processes and recommend process improvements.

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### 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 judgment, 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 relation with our customers.

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### PUBLIC AND INTERNAL CONTACTS

Requires interaction with people at all levels of the organization, local agencies, members of the public, and offices of members of the legislature. May attend public meetings.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements include sitting for long periods and daily use of a computer and telephone. Sitting may be in excess of 6 hours per day. Daily use of a computer may be in excess of 4 to 6 hours per day. Requires manual dexterity to operate a computer for preparation of project models, reports, and forms. May be required to move large and/or cumbersome plans, and/or diagrams from one location to another. Requires occasional bending, stooping, and kneeling. The location of meeting sites may necessitate traveling on long stretches of highway through urban and rural areas. Must be able to travel for sustained periods of time and/or on uneven terrain. Some terrain may cause the jostling of a vehicle

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occupant.

Mental requirements include sustained mental activity needed for report writing, problem solving, analysis and reasoning. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

Emotional requirements include interacting with people at all levels of the organization. It is important to develop good working relationships and work with all in a cooperative manner. Requires the ability to resolve emotionally charged issues reasonably and diplomatically. Must be able to create a work environment that encourages creative thinking and innovation.

Must possess a valid California Drivers License.

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## WORK ENVIRONMENT

While at the base of operation, the incumbent will work indoors in a climate-controlled office under artificial lighting.

Activities include, but are not limited to, sitting for prolonged periods of time while using the telephone, keyboard, and video display terminal. Keyboard use will be approximately 75% of the time. May require employee to work long hours, and vacations may be restricted during expected and/or unexpected peak workload periods. Visiting the project site may involve exposure to vehicular traffic, construction equipment, dust, weather extremes, and walking on uneven surfaces and climbing slopes.

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.)

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EMPLOYEE (Print)

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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)

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SUPERVISOR (Signature)

DATE