

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst (General)	OFFICE/BRANCH/SECTION District 12/Division of Capital Outlay Support	
WORKING TITLE Assistant to the COS Deputy District Director	POSITION NUMBER 912-501-5157-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 Branch Chief in Construction, a Staff Services Manager I, and under direction of the Deputy District Director (DDD) of the Division of Capital Outlay Support, the incumbent will be responsible for problem definition, developing project plans, identifying alternative solutions, implementing a course of action, and monitoring the results of special projects/assignments. The incumbent will act as the Training Coordinator for Project Delivery Offices (except Construction); will provide purchasing support for Project Management Office and Environmental Analysis Division; will ensure the efficiency of the DDD's office; will research policies, procedures, guidelines as directed and will coordinate project responses from various Offices under the DDD's directives. The incumbent will also serve as the liaison between the Division and the Executive Office and may provide support coverage.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
25%	E	Performs work related to special projects and assignments by developing plan of action, researching and compiling relevant materials, determining alternatives and providing recommendations. Reviews future projects that could impact the Division and meet with the DDD, Office Chiefs, and/or specialists to discuss alternatives. Sets time-line and monitors progress of long term projects, provides DDD with frequent status on completion, pending actions items, and/or barriers to project completion. Projects may be related to Legislative, Departmental, District, or Division policies, guidelines, and/or internal/external reports. Researchs and compiles materials as relevant to Division of Capital Outlay Support's special projects. Ongoing, frequent consultation with the DDD or his/her designee about the status of current issues that require responses. As directed by DDD, reviews new/current policies and procedures of District, Division, and Headquarters (HQ) for noncompliance with existing laws, rules, and regulations. Consults with Office Chiefs and works as a team member to determine the causes (e.g. process, equipment, technology, personnel, etc.) and identifies the various alternatives. Independently summarizes the issue and presents findings to DDD and monitors implementation of the recommendation.
20%	E	Acts as the Training Coordinator of Project Delivery Offices (except Construction). Consults with Office Chiefs, supervisors, HQ staff, other training coordinators, internal and external contacts in course of work to analyze needs, uses Learning Management System to schedule training classes, monitors enrollment authorization, closes out classes, updates training history files, and coordinates training materials as needed.
20%	E	Reviews accounts for expenditures, availability of funds and resources for Construction as needed. Tracks account usage gathers, tabulates and track data for vendor and construction project expenditures, provides status of funds, charges and provides alternative recommendations to the supervisor, and processes necessary notices to staff. Reviews and process charges and/or reverse charges for project or overhead accounts and tracking expenditures. Assists and Monitors in the administration of construction expenditures including working with the Budget Department in assuring construction expenditures are maintained within budget allocation. Analyze and Track Resident Engineer Office funds, projections for future procurement needs of construction administration, field offices and project delivery.
20%	E	Provides support for ordering of office supplies, equipment, manual, and other purchasing documents utilizing CALCard purchase order (CPO), RQS, Contract, and EFIS system for the Offices of Project Delivery and Division of Environmental Analysis. Obtains and evaluates bids from various vendors to prepare purchase goods/services documents in compliance with established Caltrans purchasing guidelines.

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15% M Reviews, anticipates, and coordinates meeting needs for the DDD. Coordinates travel arrangements between the DDD and other Office Chiefs in the Project Delivery Divisions, HQ staff, and external officials for meetings such as Orange County Transportation Agency (OCTA), Southern California Association of Governments (SCAG), Federal Highway Administration (FHWA), Executive Board, etc. Manages the DDD's calendar to ensure no duplicate appointments exist and meeting times are adequate with suitable parties invited. Provides daily itinerary and summary of in-progress projects to the DDD. Interprets current Departmental travel policy and compiles travel expense claims (TECs) for the DDD on a weekly/monthly basis. Reviews Office Chiefs' TECs for accuracy and charging practice prior to submitting for DDD's signature. Provides backup coverage to clerical support staff in tracking reports and preparation of summary management reports.

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

Knowledge of: Principles and modern methods of public and business administration including organization, administrative analysis; principles and practices of general business management, modern office methods, forms, and equipment; organization and functions of the various Departments within the organization. Computer proficiency and knowledge of various computer software applications such as Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Outlook, and the Internet is desirable.

Ability to communicate and follow direction at a level required for successful job performance. Ability to modify and change work methods to solve various problems encountered in daily operations. Ability to interact cooperatively and effectively with multi-disciplinary staff. Analyze administrative problems and adopt an effective course of action; reason logically and creatively; consult with and advise administrators and other interested parties on subject matter within the area of assignment; develop and implement new and revised methods and procedures; ensure operational effectiveness of the DDD's Office; establish and maintain cooperative working relationships; analyze data and present ideas and information effectively; demonstrate capacity for assuming increasing administrative responsibility. Ability to interact as a team member in a fast-paced environment.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The responsibility for decisions made by the incumbent has direct consequence on the DDD's Office, District 12. The incumbent must understand that he/she will be exposed to confidential and sensitive material and information. Errors in judgment could result in civil and/or criminal liability for the DDD and the Department. Additionally, errors in judgment and inappropriate actions of the incumbent could reflect adversely on the District, the Department, and the California State Transportation Agency.

PUBLIC AND INTERNAL CONTACTS

As a member of the DDD's team, the incumbent will have continued contact with other members of the District Executive Management, Senior members within the District and the Department, and the Executive support staff within the organization and other Caltrans employees.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements: The incumbent will be required to operate within confined spaces which may require some stooping, bending, standing, or sitting for prolonged periods. May be required to stay seated at desk except during designated breaks and meal periods. May be required to sit in or operate a state vehicle. May be required to move equipment between various floors on a handcart which may require pushing and moving items that weigh as much as 50 pounds. May be asked to stand for prolonged periods when attending special events with the DDD or his/her designee.

Mental and Emotional: Must have the ability to develop and maintain cooperative working relationships; respond appropriately to difficult situations; recognize emotionally charged issues or problems. Will be required to deal tactfully and courteously with the public and internal/external customers. Must adhere to the Department's equal opportunity policies and directives against discriminatory or harassing behavior. Must be able to focus on precise activities beyond the distractions of a busy business environment; be emotionally stable, alert and aware at all times. May need to

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prioritized work tasks to meet competing deadlines. Must reason logically, draw valid conclusions, make appropriate recommendations; and adopt an effective course of action. This position is responsible for working cooperatively with team members, managers and supervisors to identify innovations that will increase productivity, reduce cost and maintain and improve quality products and services for the Department. This position must adhere to customer service standards set by his/her unit and provide high quality service to both internal and external customers.

WORK ENVIRONMENT

The incumbent will be based in an office environment that is climate-controlled under artificial lights with some outdoor travel being a possibility. May be required to stand or sit for long periods of time. May be exposed or put in stressful situations. Will be required to operate various office business machines and electronic devices during the course of the assignment such as photocopiers, computers, printers, scanners, telephones; pagers, and cell phones.

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