

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION D44/Project Management/Administrative Support	
WORKING TITLE Management Support	POSITION NUMBER 913-016-5157-009	EFFECTIVE DATE 08/25/2014

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 a Staff Services Manager I, the Staff Services Analyst (SSA), serves in a customer service environment for Project Delivery (primary client is Right of Way and Land Survey). The incumbent serves as the coordinator for records retention and records management, responsible for the inventory of equipment, facilities, and telecommunication for the division. Performs a variety of duties independently, including the following, but not limited to:

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
25% E	<p>Under the direction of the lead analyst, serves as a coordinator for records retention and records management to ensure Project Delivery is in compliance with the Records Management Act and Section 1600 of the State Administrative Manual (SAM) by:</p> <ul style="list-style-type: none"> • Analyzes and assesses the existing record keeping system and records retention schedule using SAM laws and guidelines to develop a work plan for making improvements, including recommendations of alternatives for protecting vital records. • Recommends which records can be stored as manual files, which records can be scanned and stored on an automated system to ensure files/records are readily accessible. • Provides guidance and direction to staff on gathering vital information in maintaining essential records. • Maintains a working knowledge of the Americans with Disabilities Act (ADA) and the Information Practices Act (IPA) as they relate to Records Management. • Assesses whether a record is considered confidential in accordance with the ADA and the IPA and ensure distribution of the confidential information is limited accordingly. • Conduct research on records retention requirements. • Serves as a liaison to the departmental Records Officer. • Maintains inventory control and stockroom.
25% E	<p>Under the direction of the lead, serves as the subject matter expert property inventory control:</p> <ul style="list-style-type: none"> • Responsible for overseeing the tagging, monitoring, and inventorying all expendable and non-expendable State equipment/property. • Coordinates the disposal of surplus/unusable equipment, and processing all forms dealing with lost, stolen or destroyed State equipment. • Develops and maintains an inventory database that reflects the real-time status of equipment. This includes, but is not limited to, identifying: equipment description, manufacturer, model number, serial number, CT Tag, purchase cost, warranty terms, purchase date, purchase price, purchase request number, CDPO number, disposition, owner name, and owner office. • Performs physical inspections and counts of all property having an original unit purchase cost of at least \$500.00. • Reconciles with the Division of Procurement and Contract's (DPAC) records.
15% E	<p>Under the direction of the lead, procures for the Division of Right of Way and Land Survey:</p> <ul style="list-style-type: none"> • Works cooperatively with the Office of Land Survey to prepare and analyze statewide corporate

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needs to support the workload for the Capital Outlay Support Finance Letter.

- Works closely with the Office Land Survey (at Farmer's Market building) to identify appropriate vendors for the purchase of equipment and supplies.
- Utilizes appropriate contractual procedures in awarding service contracts and ensures that all legal requirements are incorporated and enforced.
- Prepares and reviews all purchase orders (POs) and ensure POs conform with the State Administrative Manual (SAM) and all other regulations.
- Reviews all internal charge coding and verify and process invoices for payment.
- Communicates with vendors and suppliers on availability of products, prices and delivery.
- Process the purchases through the Advantage Accounting System, including receipt of merchandise and related quotes and justifications.
- Coordinates return or exchange of items and negotiate acceptable substitutions.
- Serves as the CAL-Card/PCARS analyst.

15% E Under the direction of the lead, serves as facilities coordinator for Right of Way personnel:

- Receives, investigates and recommends appropriate action on all facility related complaints and requests for services, such as HVAC, restroom facilities, janitorial, etc. and other necessary duties in relation to customer facility needs.
- Coordinates with Headquarters Building Operations, stationary engineers and maintenance mechanic for repairs that are required and ensure work is complete.
- Maintains employee and work order database on FileMaker Pro and/or Excel.
- Prepares monthly status reports on completed facility work requests for Division management.
- Serves as liaison to the Headquarters Security Officer. Report any theft of State or personal property to the California Highway Patrol.

10% E Under the direction of the lead, serves as facilities coordinator for Right of Way personnel:

- Receives, investigates and recommends appropriate action on all facility related complaints and requests for services, such as HVAC, restroom facilities, janitorial, etc. and other necessary duties in relation to customer facility needs.
- Coordinates with Headquarters Building Operations, stationary engineers and maintenance mechanic for repairs that are required and ensure work is complete.
- Maintains employee and work order database on FileMaker Pro and/or Excel.
- Prepares monthly status reports on completed facility work requests for Division management.
- Serves as liaison to the Headquarters Security Officer. Report any theft of State or personal property to the California Highway Patrol.

5% M Assists the Associate Governmental Program Analysts in the Administrative Support Office in functional areas in coordinating and/or distributing legislative bill analysis, out-of-state/country travel, California Public Records Act, awards, and forms management. Performs special assignments as directed by the supervisor or Branch Chief, Resource Management and Administration.

5% M Cross-trains employees within respective classifications on technical workload functions to improve the efficiency and effectiveness of the Office of Administrative Support in servicing the divisions within project delivery, vendors, and internal/external stakeholders. Performs other duties as appropriate for Staff Services Analysts.

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

This position does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of the purpose, organization, policies and procedures of the Department of Transportation; the principles and

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current trends in administrative functions as they relate to resource management practices, program evaluation, and the State and Federal legislative processes; contract procedures and specification as required by the State procurement process; State and Federal laws, rules, regulations, standards, and administrative procedures. The incumbent must also have knowledge of the Department's mission, goals, and objectives. The incumbent should be familiar with the Department's Accounting Manual, the State Administrative Manual, Coding Manual, and Contracting Manual. The incumbent must have a solid understanding of what customer service is and have the ability to provide excellent customer service at all times.

Ability to reason logically and creatively; utilize a variety of analytical techniques to resolve complex managerial problems; develop and evaluate alternatives; present recommendations and information through oral and written communication methods; review and edit written reports; develop complicated written letters and reports on a variety of issues; be an advisor to program management and act on their behalf on a variety of issues; develop and maintain a level of professional integrity to insure that the best interests of the Division and Department are served. The incumbent must also have the ability to work well in the interdisciplinary team concept and be able to function in a lead capacity when called upon; manage a complex staff services program; establish and maintain project priorities.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent has extensive coordination responsibilities in a wide variety of administrative functions and is responsible for making recommendations to the Chief, Office of Program Management Support as they relate to performing completed staff work in these administrative functions. Failure to carry out the responsibilities of the position, make sound decisions or carry them out in a timely fashion will result in negative impacts on management decisions and adversely affecting the operations and project delivery in general. Also, failure to maintain files and proper records can cause delays in processing information and data. The consequence of error in decision-making may result in inefficient use of staff time, increased costs and management's time.

PUBLIC AND INTERNAL CONTACTS

The incumbent must work closely with all programming, budgeting and engineering management personnel in headquarters, as well as coordinate with, provide policy and guidelines and review of headquarters and division personnel involved in developing and managing Capital Outlay Support resources. Additionally, contacts with other state agencies, Federal Highway Administration, and all types of vendors may be required on a daily basis.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone.

The SSA should:

- demonstrate a sense of responsibility and commitment to public service;
- develop and maintain cooperative working relationships and diplomatically;
- adapt to changes in priorities;
- be able to complete tasks or projects with short notice;
- be able to adjust rapidly to new situations warranting attention and resolution; be open to change and new information;
- adapt behavior and work methods in response to new information, changing conditions, or unexpected challenges.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial lighting. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate.

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)

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EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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