STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 06/2013)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Staff Service Analyst	Division of Local Assistance/Office of Project Implementation	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Office of Project Implementation Project Support	913-110-5157-912	April 2014

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 an Office Chief, a Supervising Transportation Engineer, the incumbent processes project related documents for the purpose of securing Federal and State funds for transportation projects implemented by local agencies and others. The Analyst reviews local agency submittal packages, including project finance letters, prepares master and project specific funding agreements, and helps resolve project related issues for the various Federal/State funding programs administered by the Division of Local Assistance. The incumbent may also receive general direction from one or more Area Engineers, the Senior Transportation Engineers, regarding the processing of project-related documents and in providing other administrative and program support.

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
45% (E)	Responsible for assisting Area Engineer to help with project authorization on behalf of Caltrans, execution of project agreements with Local Agencies and making recommendations for project allocations to the California Transportation Commission (CTC). Process and monitor all local agency requests for funding, track projects from inception to completion. Prepare and process Program Supplement Agreements (PSA), Master Agreements (MA), Planning Programming and Monitoring Agreements (PPM), Match Exchange, Freeway Service Patrol agreements and all other agreements as required. Ensure each project funding agreement is correctly identified, dollars are correctly specified and balanced, and that correct covenants are used. Generate agreements that require changes, special letters and/or amendments for Area Engineer review and approval. Process Conformed copies and send to Local Program Accounting (LPA) for final encumbrance, processing and payment of invoices. Generate Executed letters for Area Engineer review, approval and signature and mail to appropriate parties. Generate executed letters for PSAs, mail and distribute as required. Process allocation letters, mail originals and copies to all parties as required. Monitor progress of PSAs, contact local agencies and provide excellent customer service pertaining to any missing documents or agreements needed to complete processing such as board resolutions. Verify executed Master Agreements.
25% (E)	Support Area Engineers and Assistant Area Engineers to process, monitor and track local agency requests and submittal packages from District Local Assistance offices for Federal aid and State funded projects. Make recommendations to the Area Engineer for corrections. Prepare new project folders and amend existing folders as required. Keep project files organized, information up to date and file areas neat and clean. Add new information to the files per instructions. Check progress on E-76s, print and file executed E-76 summaries. Send via email any documentation needed or requested by local agency, District or FHWA. Collect and prepare information for Audits when and if requested.
20% (E)	Maintain and update individual project file information into the statewide Local Assistance Project Database (LP2000), the Federal Aid Database System (FADS), and the Financial Management Information System (FMIS) as per requirements. Enter information into LP2000 milestones per E-76 request and FMIS approval. Update agency contact information as received and as needed. Coordinate with Local Program Accounting (LPA) to assure timely processing of agreements and share any issues with Area Engineer. Analyze LPA encumbrance data and apply mathematical calculations to ensure accuracy and completeness. Close projects that have a 9B status, box and send to Archives as per archiving procedures. Archive project files per records retention policy. Retract archived project files as needed. Research and locate missing project files.
10% (M)	Under direct supervision of the Office Chief of Project Implementation Office North/South the Staff Service

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Analyst will act on behalf of the other Staff Service Analysts during his/her absence handling those duties that cannot or should not be delayed for an extended period of time. Assist the Area Engineer with project related issues and inquiries. Analyze office procedures and processed for efficiency and effectiveness and make recommendations for improvement. Provide support for developing monthly reports, performance reports and other reports as requested. Provide training to new staff.

[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 not designated Supervisory.

KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS

Experience and education required for the classification of Staff Services Analyst.
Must be proficient in word processing, spreadsheets and databases using PC computers.
Ability to work well with people at all levels within the Department and outside.
Ability to exercise sound judgment and demonstrate effective decision-making.
Ability to quickly grasp new ideas and incorporate them into existing procedures and policies.
Ability to work independently as well as part of a team.
Ability to analyze data and apply appropriate mathematical calculations to ensure accuracy and completeness.
Ability to write/compile reports, prepare and program funding documents, analyze situations, take effective and appropriate action, and provide effective leadership to 5 to 8 staff members.
Ability to organize and maintain a large number of project files updated and in a manageable shape.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for assisting with project authorizations, execution of project agreements and making recommendations for project allocations to CTC. Incorrect decisions could impact the funding eligibility, loss of funds, project delivery delays of local projects. Incorrect decisions could impact the Department's credibility and image to the public and transportation users.

PUBLIC AND INTERNAL CONTACTS

This position maintains contact with Headquarters Local Assistance Office Chiefs, Area Engineers, Assistant Area Engineers, Program Management and Information Systems staff; District Local Assistance Engineers and their staff, Local Programs Accounting staff, Federal Highway Administration financial staff, State Archives, and Local Agencies. These contacts will be verbal or written, as needed, to perform assignments.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The employee is required to sit for long periods of time using a keyboard and video display terminal. Performing duties for this position requires regular punctual presence at the office site. Mental requirements may include sustained mental activity needed for report writing, auditing, problem solving, analysis and reasoning, etc. Emotional requirements may include the ability to develop and maintain cooperative working relationships; respond appropriately to difficult situations; recognize emotionally charged issues or problems; and acknowledge the various responses.

WORK ENVIRONMENT

While at the base of operation, the employee will work in a climate-controlled office under artificial lighting. Employee may also be required to travel to field sites, other office buildings and work outdoors and may be exposed to dirt, noise, uneven surfaces, traffic

conditions and/or extreme heat or cold.

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