

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Staff Services Analyst (Gen)	OFFICE/BRANCH/SECTION 56/Maintenance/Office of Management Services	
WORKING TITLE Management Services Analyst	POSITION NUMBER 913-660-5157-918	REVISION DATE 11/07/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general direction of the Branch Chief, Office of Management Services, a Staff Services Manager I, the incumbent exercises a high degree of initiative and independent judgment in researching, gathering, analyzing, and compiling data from various sources to prepare special reports, correspondence, and spreadsheets requested by management in support of business initiatives and projects. Incumbent responds to staff and management questions by conducting research, analyzing material, and drawing sound conclusions and presenting results to management. Assigns, tracks, and analyzes special project assignments utilizing Microsoft (MS) Excel and following Maintenance's procedures

CORE COMPETENCIES:

As a Staff Services Analyst (Gen), the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Employee Excellence - Collaboration, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, Equity)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - Collaboration, Innovation, Integrity)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety, Employee Excellence - Collaboration, Equity, Innovation, Integrity, Stewardship)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Employee Excellence - Collaboration, Equity)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Employee Excellence - Collaboration, Equity)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Employee Excellence - Collaboration, Equity, Integrity, Pride, Stewardship)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Employee Excellence - Collaboration, Equity, Innovation, Integrity)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

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30%	E	Performs technical and analytical duties and works closely with Maintenance management in support of the Division of Maintenance. Manages and ensures timely completion of studies, reports, and projects on a variety of issues by designing, implementing, and overseeing systems to track documents and completion dates; reviews and evaluates the content for accuracy and consistency. Researches, gathers, analyzes, and compiles data from various sources to prepare special reports, executive level presentations, correspondence and spreadsheets requested by management in support of business initiatives and projects. Gathers and analyzes data and presents information to management for planning and formulating policies, procedures, and processes. Works with Out of State Travel (OST) Coordinator to prepare the annual out of state travel blanket and processes all OST requests to submit to the Division OST Coordinator.
20%	E	Serves as Records Retention and Records Management Coordinator for the Division of Maintenance. Provides guidance and direction to staff on gathering vital information for records that are essential to maintain. Ensures that the Division is in compliance with the Records Management Act and Section 1600 of the State Administrative Manual (SAM). Conducts research on records retention requirements. Maintains a working knowledge of the Americans with Disabilities Act (ADA) and the Information Practices Act (IPA) as they relate to Records Management. Independently assess whether a record is considered confidential in accordance with the ADA and the IPA and ensures distribution of the confidential information is limited accordingly. Serves as a liaison to Departmental Records Officer and Public Information Officer for Public Records Requests for the Division.
20%	E	Monitors, responds to, and distributes emails from Division of Maintenance's Clerical Work Request inbox, and answers Maintenance's main telephone line to provide customer service by responding to general inquiries from a wide range of contacts from various sources using good judgment and professional etiquette. Manages, organizes, and updates Maintenance's process and procedure by evaluating policy, procedures, and processes and making recommendations to management. Implements new administrative procedures. Assists with ADA remediation on Word and PDF documents to ensure compliance with state policies. Assists in writing Policy Memos, Issue Memos and GOARS. Routes for internal and external approval and signature. Tracks the status of all Memos.
10%	E	Performs ergonomic evaluations of average difficulty. Evaluates and interprets results and offers possible solutions. Prepares ergonomic evaluation memorandums. Contributes to the development of internal ergonomic guidelines, standards, procedures, and policies. Reviews existing policies and recommends revisions where appropriate. Responsible for maintaining accurate, confidential records for storage and retrieval using various departmental templates.
10%	E	Handles a variety of procurements including, but not limited to; furniture, IT, non-IT, and reasonable accommodation acquisitions. Stocks and purchases supplies for Headquarters office and for several satellite offices as needed or requested by staff, utilizing departmental procedures to ensure proper material is acquired for daily operations. Tracks, maintains, organizes, and secures supplies and various equipment. Receives and refers requests for repairs/service of office workstations, laptops, cell phones and machines (printers/ etc.) to maintain equipment in working order. Receives packages and log them in the purchasing database then deliver to the appropriate person. Receives and timestamps mail, then either delivers to the appropriate person's desk or via scans and emails depending on the circumstances. Coordinates pay warrant and travel expense claim checks distribution on monthly basis.
10%	M	Cross trains with other Administrative positions to be able to provide backup support as requested. Participates in advisory groups to improve departmental processes and systems and resolves issues that impede operations by researching and developing proposals for improvements. Performs Webmaster duties as needed.

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, may act as lead over other staff or on special projects.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of principles, practices, and trends of public and business practices. Must have knowledge for methods used to track and monitor expenditures and resources. Must have knowledge of the Caltrans Work Breakdown Structure (WBS), Resource Breakdown Structure (RBS), data requirements of the Caltrans project managers, functional managers, task managers and

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existing project related information systems. Must have a thorough understanding of Critical Path Method (CPM) of project scheduling. Must understand project funding and how it applies to project schedules.

Must be able to plan, organize, prioritize, and analyze data from multiple sources. Must have the ability to schedule, manage and status Caltrans capital outlay projects using a sophisticated computer scheduling tool. Must be able to have the ability to forecast and anticipate problems arising in project schedules and project resource assignments, and effectively communicate with the project manager, Office of Project and Project Management staff, and external partners. Must have the ability to motivate and persuade other functions to complete project deliverables. Must be able to demonstrate the ability to work and act independently with initiative and follow up. Must be skillful in performing numerical and statistical calculations to provide useful information. Must have the ability to initiate tasks with little or no instruction based on project needs.

Must be proficient in using major computer software and databases used by Caltrans (such as EFIS, PRSM, Word, Excel, Outlook and CTIPS).

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for the independent action and initiative in carrying out assigned duties. The incumbent is responsible for providing effective, pertinent, and responsive administrative support and information to Administrative Management.

PUBLIC AND INTERNAL CONTACTS

This position must work well with Management and other Divisions. Must maintain written and oral communications with other staff in the Division of Maintenance, Headquarters, and other Districts.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent is provided a workspace with a desk and chair configuration. The incumbent will be required to sit for long periods of time using a personal computer, keyboard, and video display terminal and/or telephone to conduct user support communication activities. The incumbent may be required to work in shared or confined spaces. The incumbent may be required to handle or carry boxes or equipment typically weighting up to twenty-five (25) pounds.

This position requires extensive interactions with individuals (internal and external); interactions must be pleasant, courteous, and professional always.

The incumbent must be able to work within tight time frames, short-term deadlines, and changing priorities.

WORK ENVIRONMENT

The incumbent will work primarily in a climate-controlled office environment with artificial lighting, and functional open space cubical style workstations. The incumbent will utilize video monitors, computer equipment, and software to perform work functions.

Working hours will be set sometime between 8:00AM and 5:00PM.

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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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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