

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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| CLASSIFICATION TITLE | OFFICE/BRANCH/SECTION | |
| Analyst II | D04/Maintenance/East Bay/Delta Region | |
| WORKING TITLE | POSITION NUMBER | REVISION DATE |
| Region Support Analyst | 904-640-5393-XXX | 01/23/2026 |

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 and supervision of the Supervisor I and the Maintenance Manager II, the Analyst II is responsible for the analysis, preparation, and monitoring of the budgetary and fiscal data (Personal Services and Operating Resources) for the East Bay / Delta Region. Additionally, the incumbent will have a role and knowledge of purchasing, contracts, coding, encumbrances, expenditures, EFIS and accounting procedures, position tracking and hiring. The incumbent acts independently performing critical program workload and must have regular and punctual attendance in order to maintain the budgetary requirements. Some travel may be required. Must possess a valid drivers license.

CORE COMPETENCIES:

As an Analyst II, 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. (Safety, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Collaboration, Integrity)
- Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Employee Excellence - Collaboration)
- 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. (Employee Excellence - Equity)
- Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - Collaboration, Integrity)
- 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. (Safety, Employee Excellence - Collaboration, Pride)
- 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 - Equity, Innovation)
- 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. (Safety, Employee Excellence - Collaboration, Pride)
- Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Employee Excellence - Collaboration)

TYPICAL DUTIES:

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

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| 30% | E | Works closely with Region in preparation of Position Action Request Forms (PARF) and Appointment Request forms (ARF); works closely with the Post and Bid Coordinators, coordinates with the District office hiring analyst for PARF information, budget approval and management signatures; work with headquarters human resources on hiring employees; works with Supervisors in developing, writing and revising duty statements, screening criteria's, ECOS/VPOS advertisements, CalHR systems and local organization charts; set up all interviews and creating interview packets for panel members that include preparation and evaluation of interview questions; coordinate new employee orientation with district personnel. Assist SSM I by handling district and/or headquarters projects related to surveying and reporting status on Region's position(s)/vacancies. Will keep the SSM I updated on issues concerning assigned duties and advise of problem areas being elevated or that may need to be elevated to complete Region business and job duties. |
| 20% | E | Performs a wide variety of technical and analytical services by assisting Region with tracking, research of statistical data, managing budget encumbrances/disencumbrances, Cal-Card Purchases, Procurement and Contracts, Contract Delegation Purchase Orders (CDPOs), RQS (Requisition) processes for all maintenance materials purchased, Collects, researches, analyzes data for accuracy and comparison of all CDPO expenditures against the Region's budget database system from the field area supervisors and superintendents, ensuring compliance measures are met with materials purchased and expiration dates of contracts. Run various monthly reports, while working closely with the District's Budget Liaison ensuring encumbrances and dis-encumbrances are accurately liquidated. |
| 15% | E | Provides statistical support and reports to the SSM I, Region Manager II, or Region Manager I regarding operational needs for budget purposes and future staffing needs based on current spending trends; utilizing all Microsoft programs including but not limited to Excel to review, analyze and input/export information into spreadsheets and reports. |
| 10% | E | Assist the Regions Contract Manager with analyzing, evaluating, writing, and monitoring Contracts, Labor Compliance, Prevailing Wages, in the Regions Maintenance Division. Perform administrative tasks ranging from implementing selected Services Contracts from requesting contract services to authorizing final payment for satisfactorily completed services. Performs research on reports provided by Headquarters Maintenance, Accounting, DPAC and the District Budgets office to analyze and resolve contract budget and accounting issues to ensure compliance measures are met within budget capacity. |
| 10% | E | Maintains Organizational Charts, Positions on Board, Post & Bid logs, provides weekly, monthly, or quarterly status reports upon request. |
| 10% | E | Acts as the Training Coordinator for the Region. Request and monitor training in the Learning Management System (LMS). Create course sessions as needed and ensures that all mandated employee training is current and up to date. |
| 5% | M | Performs other duties as required within the classification. |

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 and this position requires strong leadership skills. May act as the lead in the SSM I's absence.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position required detailed and sensitive employee contact and independent action. Must have strong written and verbal communication skills and the ability to prepare detailed written correspondence, in a clear and logical manner. Must be able to present ideas and information, both orally and in writing. Must be able to determine priorities and maintain accurate records. Must have good organizational skills and be able to discern what information needed. Must have computer skills in Microsoft Word, Excel, Outlook and other databases. Must have knowledge and adhere to, Best Hiring Practices rules and regulations as outlined by the Department of Human Resources and Bargaining units Memorandum of Understanding and effectively identify, analyze, and evaluate information. Must be able to demonstrate a positive attitude and a commitment to conduct business in a professional manner; to reason logically and to utilize a variety of analytical techniques to resolve problems, develop and evaluate alternatives. Must have the ability to perform professionally, follow oral and written directions, evaluate directions accurately and take effective action.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in judgment may result in the release of confidential information. This may result in monetary loss to the department in the form of lawsuits, grievances or other legal action and/or cost to the Maintenance Program. Failure to carry out the above

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identified duties may result in inaccurate information and loss of credibility for the Department.

PUBLIC AND INTERNAL CONTACTS

Incumbent will have contact with all levels of departmental staff. Incumbent will work closely with various Headquarter staff. This position will also have contact with the general public. Must be congenial and tactful in dealing with others and must have the ability to develop and maintain cooperative working relationships.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Will be required to sit for long periods of time using a keyboard, video display terminal and sit stand desk. Other physical activities will include standing, walking, bending, at the neck and waist, stooping, squatting, kneeling, twisting at the neck and waist. Other activities may be reaching above shoulder, pushing or pulling, simple grasping, or fine manipulation. Must be able to analyze and prioritize work situations and take effective action to resolve any problems encountered. Must be able to work effectively under changing priorities. Must be able to develop cooperative working relationships and respond appropriately to the needs, feelings and diversity of employees. This position works with sensitive information and must be able to maintain confidentiality and be able to interact with all levels of staff and the general public in a cohesive manner.

WORK ENVIRONMENT

Will work in a climate-controlled office under artificial lighting. Will sit for long periods of time using a computer and monitor, Sit-Stand Station. Maybe exposed ot noise, and or extreme Heat/Cold temperatures. May be required to travel and share responsibilities in answering phones and Dispatch Radio for the Region. This position may include telework.

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)

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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.

SUPERVISOR (Print)

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| SUPERVISOR (Signature) | DATE |
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