

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Supervisor I	OFFICE/BRANCH/SECTION D44 Project Management/COS Statewide Resources Branch	
WORKING TITLE Branch Chief, COS Statewide Resources	POSITION NUMBER 913-016-4800-006	REVISION DATE 04/06/2026

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 of the Supervisor II, Division of Project Management, Office of Statewide Budget and Resources Management, the incumbent has supervisory responsibilities of staff for the management of Cost Accounting Setup (CAS)/Cost Accounting Maintenance (CAM) for authorizing the opening and closing of project phases which supports Caltrans project management tools used to develop/manage workload and schedules for all Capital Outlay Support (COS) projects throughout the state; and Project Change Requests (PCRs) to identify and implement potential changes to CAS/CAM. The incumbent also is responsible for supervising the processing and monitoring of Hiring Exemption Requests; and managing the COS Statewide Fleet Program.

CORE COMPETENCIES:

As a Supervisor I, 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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Prosperity, Employee Excellence - Innovation, Pride, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity, Employee Excellence - Integrity, Pride, Stewardship)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Prosperity, Employee Excellence - Integrity, Pride, Stewardship)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Prosperity, Employee Excellence - Innovation, Integrity, People First, Pride)
- **Motivational Support:** Skilled at enhancing others commitment to their work. Recognizing and regarding people for their achievements. (Prosperity, Employee Excellence - Integrity, People First, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Prosperity, Employee Excellence - Integrity, People First, Pride)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Prosperity, Employee Excellence - Integrity, People First, Pride)
- **Workforce Management:** Hires and retains appropriate staff. Conducts workforce and succession planning. Provides feedback on performance. Addresses employee issues in a timely manner. (Prosperity, Employee Excellence - Integrity, People First, Pride)
- **Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Prosperity, Employee Excellence - Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

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

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35%	E	Supervise and coordinate statewide communication relating to the CAS/CAM and work with Project Management based financial management software. Supervise and direct the authorization of opening and closing of project phases for all COS projects across the state in a timely manner. Supervise the verification of Federal funds allocated to projects, project workload flags, authorized fund codes, work phases, valid work plans, project budget constraints, and review financial reports. Supervise and monitor project scope, cost, and schedule in Project Resource and Schedule Management (PRSM), AMS Advantage, California Transportation Improvement System (CTIPS), and Earned Value Reporting System (EVRS). Supervise and perform special studies and prepare reports on various operational and organizational issues as needed by management.
35%	E	Supervise the review, analysis, and verification of pertinent information for Caltrans allocated and current PS dollars, positions in the blanket, overhead allocations/expenditures, manager/staff ratios for Hiring Exemption Requests from Caltrans districts and Headquarters (HQ). Supervise and manage the Hiring Exemption Delegation process. Present recommendations for approvals to management.
15%	E	Supervise the COS Statewide Fleet Program, in collaboration with the Division of Equipment (DOE) and districts, to ensure all Caltrans districts are appropriately resourced, program needs are met, and full utilization of vehicles and equipment is achieved. Represent the COS Statewide Fleet Program when necessary.
10%	E	Plan, prepare, and coordinate drills and special reports on various COS Program budgetary issues from internal and external customers and partners. Supervise the development, review, and revision of desk manuals and procedural guides. Independently performs quality assurance, process review and process improvement.
5%	M	In the absence of the Supervisor II, the incumbent may need to respond to Caltrans management. Attend training courses, meetings, and conferences.

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

The incumbent directly supervises a team of analysts. In addition, the incumbent provides policy direction and guidance to Caltrans' Districts, Headquarters Divisions and/or Executive Management to develop and manage Capital Outlay Support Program resources.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must possess a thorough knowledge of Caltrans Project Management functions throughout the state, the purposes, organization, policies, and procedures of the Department of Transportation.

Must be able to judge work quality and performance; interpret Caltrans departmental policy and determine appropriate action to be taken; prepare and complete comprehensive reports, letters, and articles; make effective presentations, use good judgment for analysis of resource requirements; be able to coordinate effectively with all levels of management and employees.

Must have supervisory abilities to identify issues or conflicts in program direction and respond with good solution options, working with computerized systems. Must have a high level of expertise in communicating effectively in writing and orally, while working cooperatively with all Caltrans management.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Supervisor I is responsible for independent action and initiative in assuring that appropriate resources are allocated, controlled and adjusted as necessary. The incumbent must consider all input and pertinent factors before reaching conclusions and making recommendations on COS Program resources especially because Caltrans is liable for any amount of unlawful indebtedness.

The consequence of not considering all factors could result in inconsistent or inappropriate decisions made by management that could impact the ability to deliver the capital outlay portfolio on schedule. Errors in judgment could result in violations that constrain the use of state and federal transportation funds, highway use taxes as well as other revenues and appropriations.

PUBLIC AND INTERNAL CONTACTS

Incumbent must work closely with all programming, budgeting, and engineering management personnel in Caltrans Headquarters including Division Chiefs and Deputies, as well as Caltrans district personnel involved in developing and managing COS Program resources. Contact with external agencies is not typically required.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard and video display terminal or reviewing written

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documents. Sustained mental activity needed for report writing, auditing, problem solving, analysis and reasoning, etc. Must be able to develop and maintain cooperative working relationships, respond appropriately to difficult situations, recognize emotionally charged issues or problems and acknowledge the various responses. Creates a work environment that encourages creative thinking and innovation and sustains an organizational culture which encourages and enables others to provide the quality of service essential to high performance. Must have the ability to supervise and direct the workload of staff working to meet critical deadlines. The incumbent behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. Values diversity and other individual differences in the workforce and ensures that the organization builds on these differences and that all employees are treated fairly and equitably.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. For permanent and limited term appointments, all commute expenses to the headquartered location will be the responsibility of the selected candidate.

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