

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION D11/Planning Division Administrative Support	
WORKING TITLE Analyst II	POSITION NUMBER 911-820-5393-009	REVISION DATE 01/05/2026

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

GENERAL STATEMENT:

Under direction of the Deputy District Director (DDD) of the Planning and Local Assistance Division, the Analyst II performs independent journey level administrative work in the complex areas of Budget Monitoring, Human Resources, Administration and Analysis. The incumbent performs a wide variety of complex analytical services including managing, tracking, and monitoring the personal service (PS) dollars and operating expense (OE) for the Planning Program and Division; independently resolves charging and/or coding problems; and recommends alternative solutions for funding shortfalls. The incumbent also serves as liaison to seniors within branches of the Planning Division and is held accountable for prompt and accurate work, along with providing a high level of customer service.

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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Equity, Integrity)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Equity, Integrity)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Employee Excellence - Equity, 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 - Equity, Innovation, Integrity)
- **Fostering Diversity:** Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Employee Excellence - Equity, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Employee Excellence - Collaboration, Equity)
- **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. (Employee Excellence - Collaboration, Equity, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Prosperity, Employee Excellence - Equity, Innovation, Integrity)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Safety, Employee Excellence - Equity, Innovation, Integrity)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

45%	E	Prepares, monitors, and manages the PS dollars and OE for the Planning Program/Division. Develops, prepares, and monitors monthly, quarterly and year-end financial reports by program, fund source and branch/unit. Utilizes Datalink, InfoAdvantage, and the American Management System (AMS) databases to create these financial reports to aid supervisors and staff in monitoring the PS and OE to ensure adherence to correct charging practices and that workload needs are met. Administers the Planning Program's fiscal control of funds and financial projections by categories of expenditures to ensure the Program/Division is staying within its allocations. Independently resolves charging and/or coding problems and recommends alternative solutions for funding shortfalls. Liaises with Seniors to respond to budget, billing or payment questions and communicates with supervisors and their staff on documentation requirements from Headquarters (HQ). Examines expenditure trends to generate financial history reports to project fiscal year outcomes and makes presentations to the DDD as needed regarding funding trends and forecasts. Recommends course of action in areas of staffing and charging where necessary. Assists the DDD in preparing responses to HQ on Planning Program inquiries. Reviews, recommends and implements procedural changes and/or enhancements to advise the DDD on financial decisions. Prepares various financial reports requested from the ODD for HQ review. Attends monthly Resource Meetings.
25%	E	Writes justifications, completes Hiring Considerations Forms, and updates Duty Statements in order to initiate personnel action requests for upgrades, new hires, position reclassifications, and out of class assignments within the Division. Prepares, analyzes, and maintains vacancy reports and attrition reports for the DOD as needed for presentation to Executive Management. Creates and maintains organizational charts using Microsoft Visio including reviewing and editing for updates due to staff movement and personnel count in relation to the District Position Tracking Automated System monthly report. Works closely with Resource Planning Hiring personnel and Personnel Transactions, and serves as liaison to Seniors and Division employees to provide guidance on personnel matters such as the application of the Family Medical Leave Act, Reasonable Accommodations, Leave of Absence requests and State Disability Insurance and/or Non-Industrial Disability Insurance. Assists Seniors by consulting with the Hiring Liaisons, Personnel Transactions liaison and the State and Departmental policy.
10%	E	Serves as the Training Coordinator for the Division to ensure compliance with the Department's policies and procedures. Creates employee training templates; develops and maintains division training databases to analyze, track and monitor training courses, training histories, course schedules and other relevant training information. Prepares monthly training reports, annual training plans and division training expenditures reports for presentation to the DDD. Reviews training course announcements prior to disseminating information to each Senior. Prepares and processes training requests using Learning Management System and requests for Revolving Fund checks using the AMS/InfoAdvantage for payment of vendor training and other necessary documentation. Schedules appropriate training courses within the required time frames. Coordinates with the District Training Office and other appropriate training sources as necessary. Provides summary of classes and training expenditures to ODO on a monthly basis. Attends quarterly District Training Coordinator meetings.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

10%	E	Determines the appropriate method to purchase items or services according to the Purchasing Delegation for the Planning Division by utilizing the accounting manual to apply the necessary coding for each purchase such as object code, cost center/unit and project ID/code. In accordance with the Planning Program's allocation, approves the funding for purchases. Prepares all purchase requests in AMS and Info Advantage system with necessary specifications and justifications; negotiates with vendors regarding price and delivery for purchase of equipment, furniture, supplies and service agreements; includes timely validation of receipt of ordered goods. Ensures Payee Data Records are completed and sends to accounting. Prepares receiving records for payments, reconciles VISA statement, and resolves any accounting questions relating to these payments. Reconciles encumbrances and follow-up with Accounts Payable on any discrepancies. Develops and maintains priority lists for non-expendable equipment, software, and other operational necessities. Maintains the divisions' inventory of equipment using AssetWorks inventory management software to ensure that all expendable and non-expendable State equipment is tagged, monitored, and inventoried in accordance with the State Administrative Manual. Processes all forms dealing with lost, stolen, or destroyed State equipment and sends to the District Equipment Coordinator. Completes and processes all transfer of equipment for moves and/or to the Information Technology (IT) Unit and coordinates the disposition of surplus equipment to ensure accountability for State Equipment.
10%	M	Schedules and coordinates meetings. Attends weekly Senior Staff Meetings. Reviews Division employees' Travel Expense Claims for compliance with Departmental Travel Policy and accuracy. Requests Travel Advances through AMS for employees that request them. Retrieves employee pay warrants from District Cashier's Office to sort and distribute all incoming checks to division employees, including monthly payroll, overtime, and reimbursement checks. Provides administrative support to the ODD and Seniors 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

None. May act in a lead capacity, assigning tasks and providing guidance and training to other staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership.

Ability to reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for performing work in an accurate and timely manner by establishing priorities and exercising good judgment to minimize the potential for errors in judgment, erroneous reporting, inefficiencies, or unresponsiveness to potential problems that could result in shortfalls in meeting budget objectives, and project delivery schedules.

PUBLIC AND INTERNAL CONTACTS

The incumbent must take initiative, independently confer and communicate, and establish good working relationships with all levels of Department staff, those from other State agencies, external stakeholders including contracting entities, and the public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent is required to sit for long periods of time using a keyboard and video display monitor and engage in sustained mental preparedness to produce assigned reports and complete tasks/assignments with short notice. The incumbent must also display important problem-solving skills, provide analysis and reasoning, and multi-task as needed.

WORK ENVIRONMENT

While at the base of operation, the incumbent is required to work in an environmentally controlled office under artificial lighting. Multi-floor buildings are equipped with elevators and stairs. Some travel may be required to attend off-site meetings and training.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

Possession of a valid driver's license is required to operate a State owned or leased vehicle.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee's designated Headquarters Location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. 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