

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION District 10 MTCE Administration	
WORKING TITLE Valley Region Procurement Administrative Support	POSITION NUMBER 910-620-5157-xxx	REVISION DATE 05/08/2026

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

GENERAL STATEMENT:

Under the supervision of the Branch Chief, Maintenance Procurement Support, a Supervisor I, the Analyst I performs procurement and office support for the Division of Maintenance Valley Region. The incumbent provides administrative and analytical support and technical guidance in a wide variety of duties including the initiation, monitoring, record keeping, payments, reconciliation, and other tasks related to the procurement process. The Analyst I – Valley Region Support shall demonstrate and maintain professional, courteous behavior with the public and all Caltrans employees. The incumbent is expected to act independently; initiate improvements and office efficiencies; demonstrate open-mindedness, flexibility, and teamwork in order to gain and maintain the confidence and cooperation of management and staff at all levels within the Department. The incumbent is required to multi-task, coordinate various advanced office duties and functions, and meet the analytical needs within Maintenance Administration. The incumbent works closely with Maintenance Managers, superintendents, supervisors, and various maintenance staff by providing administrative support and guidance on purchasing, travel, and data analysis.

CORE COMPETENCIES:

As an Analyst 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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Equity - Collaboration)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety - People First)
- **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 - Innovation, Pride)
- **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 - Collaboration)
- **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, Stewardship)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Prosperity - Collaboration, Stewardship)
- **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 - People First)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Equity - Innovation)
- **Thoroughness**: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Pride, Stewardship)

TYPICAL DUTIES:

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

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30%	E	The incumbent is responsible for the procurement needs for the Valley Region Maintenance areas. This includes creating requisition documents using the Department's financial systems and databases for various materials used on State highways while following the Department of General Services (DGS) Delegated Purchase Authority methods. The incumbent will work directly with the Valley Region Manager to identify procurement needs. Incumbent is responsible for researching the appropriate procurement method, finding vendors, soliciting bids/quotes, ensuring receipt of materials and supplies, monitoring and confirming delivery tags and load slips to the control document (i.e., Purchase Orders) to establish payment due to vendors, and to maintain budget logs for purchases. The incumbent reviews and evaluates invoices and receiving documents, identifies and resolves discrepancies, demonstrating professional and productive communication with vendors and/or employees. The incumbent ensures that these documents are properly coded to accurately account for job cost and expenditure records. Enters material into inventory via IMMS.
20%	E	The incumbent serves as a credit card (Cal-Card) holder responsible for credit card purchases in support of the Valley Region Maintenance areas. The incumbent will follow all Cal-Card purchasing procedures, including reconciliation of monthly statements and maintaining procurement records. The incumbent is responsible for the monthly analysis and reconciliation of Cal-Card Statement of Accounts from Valley Region Supervisors and Superintendents for timely submission to Headquarters Accounting.
20%	E	The incumbent performs tracking and researching related to Bulk Fuel; creates MGAX documents, a method to pay non purchase order invoices; utilizes the Department's financial systems and databases to acquire goods and services for the maintenance field staff; and orders supplies from the State Warehouse on an as needed basis using the WSVS system. The incumbent surveys staff needs and assists with ordering office supplies, furniture, and equipment, etc.
15%	E	The incumbent is responsible for monitoring and organizing a shared email inbox and responding to and/or forwarding emails accordingly. The incumbent may coordinate with the Division Property Control Liaison and assist Valley Region Supervisors and Superintendents with tracking IT equipment inventory, new equipment, and identifying old equipment to remove from inventory.
10%	E	The incumbent provides coordination, support, and guidance to Maintenance Region Managers by monitoring, generating, preparing, editing, revising, projecting, and tracking monthly maintenance reports, and providing analysis and recommendations as to trends, next steps, issue identification, and resolutions. The incumbent provides encumbrance management analysis and support and works with the Procurement Team manager and Analysts on analyzing and resolving expenditure errors and mischarges. Orders business cards for the Maintenance Program.
5%	M	Provides customer service to all field maintenance personnel, administrative assistance to management when needed, responds to telephone and walk-in traffic, and may be required to travel for training or meetings, taking meeting minutes as needed. The incumbent provides support and backup coverage to peers within Maintenance Administration, including back-up on Cal-Card purchase needs for the Mountain Region and/or Maintenance Support. Incumbent provides on-site coverage when necessary. Other duties as required, including the creation and maintenance of a desk manual.

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.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have knowledge of rules, regulations, and procedures for the procurement of materials, goods, and services. Must be thoroughly competent in the use of the English language, mathematics, and written communication. Must have basic computer experience and knowledge working with financial software, databases, and Microsoft programs. Must be able to analyze information, develop ideas, provide recommendations, make cost estimates, and present information correctly and effectively, both orally and in writing including reports, emails, or memos. Must be able to analyze reports, rules, and regulations. Must have the ability to work effectively alone and/or with others of all levels.

Must have knowledge of the Department's Mission, Vision, Goals, Values and priorities with knowledge of the Maintenance Program and resources available. Must have knowledge of departmental and district manuals, policies, and procedures relating to maintenance activities. Must have a working knowledge of principles and practices of general business management, modern methods of public and business administration, fiscal management, basic administrative analysis, and budget procedures.

Must have the ability to analyze various situations that arise and determine an effective course of action. Must be able to multi-task and to work under pressure with numerous deadlines and prioritize work to meet needs. Must be able to recognize potential

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issues and initiate or make recommendations for corrective measures.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Error may cause extra expense in the maintenance of highways, or damage to State equipment, property, and facilities. Failure to make timely and proper decisions could result in lawsuits and loss of money to the department.

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. Incorrect information given to employees may adversely affect their employment status and/or employment eligibility. Incorrect information provided to the public may result in a loss of credibility for the Department.

PUBLIC AND INTERNAL CONTACTS

The incumbent must be able to communicate professionally, verbally and in writing, with all levels of staff, District and HQ partners, vendors, and the public. The incumbent is expected to treat everyone professionally and with courtesy, dignity, and respect; develop and maintain positive working relationships; present a positive, helpful attitude; and be responsive to assignments, deadlines, inquiries, phone calls, and emails.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for long periods of time while using a keyboard and video display terminal along with traveling in a vehicle to other locations. Will be involved with sustained mental activity needed for analysis, reasoning, and problem-solving. Must be able to develop and maintain cooperative working relationships, recognize emotionally charged issues, problems, or difficult situations, and respond appropriately, tactfully, and professionally. Must be able to work independently and in groups. May be required to move medium sized boxes and packages from one location to another.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial lighting. The incumbent will be exposed to computers, various lighting conditions, stand or sit for prolonged periods. Must be able to work at a keyboard and focus on complex tasks for long periods of time. Must be able to organize and prioritize large volumes of work documents. Overtime may be required and vacations may be restricted during peak times and fiscal year-end closing. Travel throughout the district may be required. Assignments in the field may be required to meet with contractors to obtain information bids or information pertaining to a contract. The incumbent will be required to wear and use mandated personal safety equipment and follow all policies, procedures, and safe working practices when necessary.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' 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 employee will be required to commute to the headquartered location as needed to meet operational needs. All commute expenses to the headquartered location will be the responsibility of the employee.

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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)

Hannah Strickler

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

Maribel Morse

SUPERVISOR (Signature)

DATE

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