

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Traffic Operations / Encroachment Permits / South	
WORKING TITLE Associate Administrative Analyst (Encroachment Permit Liaison)	POSITION NUMBER 912-610-5393-001	REVISION DATE 05/28/2026

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

GENERAL STATEMENT:

Under the general supervision of the Senior Transportation Engineer (STE) of the Encroachment Permits Branch South (EPBS), the incumbent will be responsible for working independently, with EPBS staff and in coordination with other functional units (eg. Design, Traffic Operations/Safety, Structures, R/W, etc.). The incumbent will be responsible to provide analytical and administrative support to the EPBS. The incumbent will work with encroachment permit applications, Accounts Receivable/Accounts Payable, and will act as lead with student assistants/volunteers.

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. (Equity, Employee Excellence - Equity, Innovation, Integrity, Pride, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Employee Excellence - Equity, Innovation, 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. (Safety, Prosperity, Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **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, Equity, Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, 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, Equity, Employee Excellence - Equity, Innovation, Integrity, Stewardship)
- **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. (Safety, Equity, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, People First, Pride)
- **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, Equity, Climate Action - Collaboration, Innovation, Integrity, Pride)
- **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. (Safety, Equity, Employee Excellence - Collaboration, Equity, Integrity, Pride)

TYPICAL DUTIES:

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

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30%	E	<p>Assist the Senior Transportation Engineer (STE) of Encroachment Permits Branch South (EPBS) in compiling and coordinating various reports and performance measures compliance as needed. Summarizes weekly performance logs and monthly production reports per request by STE.</p> <p>Maintain permits logs, prepare summary on a monthly basis to monitor workload and establish priorities. Manages and maintains permit files and sends notices to applicant with regards to permit status. Coordinate and develop the branch's efforts in maintaining and updating a desk manual that helps train new employees and serves as a reference tool for team members.</p> <p>Schedule and assist STE in conducting branch meetings and pre-acceptance conferences for permits applications as requested. Determines key people involved by communicating with Permit engineers and reviewing action items with STE prior to sending Outlook invitation, prepares room reservations and all materials needed for the meeting. Acts as back-up in scribing notes and minutes of the meetings.</p>
25%	E	<p>Prepare and organize documents for billing purposes. Works with Accounts Receivable and Accounts Payable to ensure proper accounts are established and notifies them of any refunds due to an overpayment situation. Closely examines all past due accounts, and takes appropriate action to collect monies owed to the State. Performs permits closure process. Coordinates with Maintenance Support staff for Adopt-A-Highway program, writes permits, and manages the approval process; subsequently, sends out the permits to the Maintenance Regional Office.</p>
25%	E	<p>Receive and process encroachment permit applications alongside the other administrative support staff. Prior to accepting applications, must understand and implement the timeline for processing Encroachment Permit Application Package (EPAP). Conduct screening of every application. Determine acceptance or rejection based on compliance with the State and Federal laws, Caltrans standards, policies, guidelines, Checklists, completeness of all application forms, plans, and applicable supporting documents. Analyze permittee's intent and the scope of work, determines the permit type and assigns the permit. Assist and makes recommendations to the Permit Engineer for approval or denial.</p>
15%	E	<p>Performs packaging and sending out of permits/denial letters, inputting of permit applications on the Caltrans Encroachment Permit System (CEPS), revising special provisions, routing of application for departmental reviews, incoming and outgoing mail, taking incoming calls and email inquires, ensures prompt responses to the customers. Receives calls/emails from Public Information Office (PIO) on public inquiries and performs research for appropriate responses.</p>
5%	M	<p>Monitors Permits office supply and inventory and equipment use and maintenance. Acts as Lead of student assistants or interns by coordinating the student schedules, planning their daily tasks and keeping track of their hours and attendance.</p> <p>Performs other duties that may be assigned.</p>

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. The incumbent reports to the Senior Transportation Engineer for Permits Branch South, and may act as the Lead for the Permits Branch student assistants and volunteer workers.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must have knowledge of principles and methods of public and business administration including organization, fiscal and personnel management training, and general business management, budgetary procedures, purchasing, and principles of safety practices.

The incumbent must be able to work independently with a minimum of supervision. Must have the ability to use a variety of analytical techniques to independently analyze and resolve complex administrative problems; conduct research and present conclusions in a clear and concise manner and adopt an effective course of action; develop, revise and implement new methods and procedures; plan, organize, and direct the work of an administrative unit; training. The incumbent must demonstrate excellent communication skills, speak and write effectively; and prepare memorandums, letters and reports, etc. Must operate a PC with intermediate Excel skill, Word, Power Point, MS Outlook; navigate Department Intranet and Internet for research purposes; basic knowledge of Enterprise Financial Infrastructure (EFIS), AMS Advantage, Staff Central and Learning Management System.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent assumes responsibility for administrative decisions for the Division. He/She is responsible for identifying problems that need immediate attention, coordinating action and changes as necessary for correction. Miscommunication with others could

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result in loss of time in completing requested staff work.

PUBLIC AND INTERNAL CONTACTS

The incumbent will have frequent contact with office and field staff, seniors, managers, and functional units within the District and HQ. Must communicate effectively and politely when answering inquiries via email or on the telephone. May have contact with public, vendors, other external customers, and other district employees, management and Headquarters staff, often prioritizing and referring calls to internal staff or other units

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and personal computer. In order to perform the required tasks, the nature of the work will require physical abilities including bending, squatting and reaching for files contained in filing cabinets. Incumbent must have the ability to quickly change priorities and assignments as may be required by Division Managers, and the ability to develop and maintain cooperative working relationships.

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 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, as determined by the Department. Incumbent will be exposed to various work environments. While at their base of operation, the employee will work in a climate-controlled office under artificial LED lighting. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. The selected candidate may be required to travel to the headquartered location, therefore, incumbent must be able to travel using a car or commercial transportation. The duty statement may be updated on a yearly basis and/or as the job functions change.

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