

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION Administration, Business Operations, Facility Operations	
WORKING TITLE Administrative Services Analyst	POSITION NUMBER 910-001-5157-XXX	REVISION DATE 06/04/2026

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 Facility Operations Branch Manager, the Administrative Services Analyst serves as the District's Records Retention and Forms Management Coordinator, as well as the Administrative Property Control Liaison, where they perform analytical work in areas of retention policies, form management, and asset control. The incumbent is also responsible for administration-related procurement and the District's recycle program.

**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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)

**TYPICAL DUTIES:**

Percentage                      Job Description  
Essential (E)/Marginal (M)<sup>1</sup>

**ADA Notice**

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30%	E	The incumbent will act as the District Records Retention and Forms Management Coordinator. As the Records Retention Coordinator, the incumbent will serve as the district contact for records management in coordination with the Division of Records Officer and the Statewide Records Management Coordinator, administer and control the operation of District records center, and establish a network of Office and Branch Coordinators to apply the Records Management system throughout various Office and Branches in the District. The incumbent will develop and monitor records retention schedule that outlines the treatment of records regarding retention time, record storage, and destruction of records. Coordinates the process of collecting and maintaining data related to record retention. As the Forms Management Coordinator, the incumbent serves as the liaison between the office/program and the Forms Management Unit (FMU) and is responsible for the maintenance and management of all forms for that respective program. The incumbent will coordinate with authors, subject matter experts, or requestor of the form to submit the request to FMU, tracks the editing process, participates in FMU-led meetings and conferences, reports non-compliant forms, and approved forms prior to being published to Caltrans Electronic Forms System (CEFS).
30%	E	The incumbent will act as the Administration Division Property Control Liaison (PCL), working with the District Property Controller and Information Technology (I.T.) to ensure the tagging, monitoring, and physical inventorying of all expendable and non-expendable State equipment/property is in accordance with the requirements of the State Administrative Manual (SAM). The Administration PCL controls the internal inventory database for Administration staff, reviews requests for property surveys, and reports of lost, stolen, damaged or destroyed property for completion and forward to the District Property Controller. The PCL is responsible for attending reoccurring Property Control meetings and trainings.
25%	E	Procures Administrative and Facility related products and services while adhering to all Division of Procurement and Contracts (DPAC) policies and procedures. Participating in reoccurring procurement meetings and trainings and maintains procurement and contract manager certifications. Follows DPAC's buyer's responsibilities as a Contract Manager and participates in the Cal-Card Program. Obtains quotes and bids from vendors.
15%	M	The incumbent acts as the Recycling Coordinator and is responsible for implementation of recycling programs for the district and annual reporting of those programs to Cal Recycle. Monitors, responds, and processes incoming email requests received through the facilities inbox. Performs other duties as assigned.

<sup>1</sup>ESSENTIAL 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 other employees.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Must be knowledgeable of the Department's mission, vision, goals, and objectives. Ability to organize/prioritize workload to meet demands. Analytical skills, and interpersonal communication to work with staff of all levels within the organization. Ability to multi-task, and meet multiple deadlines in a timely manner is required. PC knowledge and proficiency with applications such as Word, Excel, Outlook, and Adobe Acrobat Pro, are needed. Must conduct research and analysis utilizing available resources, work independently, exercise good judgment, and sound decision making. Must be energetic, creative, flexible, positive, self-motivated, conscientious, dependable, and reliable.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Responsible for effective decisions, actions, and planning. Incumbent is responsible for ensuring expenditures stay within budget limits. Failure to do so could result in costly overruns and severe impacts to the Department's fiscal solvency. In this capacity, the position must make diplomatic decisions consistent with State policy. Improper decisions could result in deadlines not being met and monetary loss to program funding.

**PUBLIC AND INTERNAL CONTACTS**

Incumbent must maintain an effective working relationship with Headquarters, Districts, and the public. Incumbent must demonstrate a courteous, respectful, and professional disposition to all individuals they encounter. Must be able to communicate by phone, letter, e-mail, and in-person with internal and external entities concerning all areas of job related duties.

**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Incumbent may be required to sit/stand for long periods of time using a keyboard and video display, or to review written

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documents and plans. Must be able to effectively communicate in English and be required to make presentations or serve on committees. Must be able to organize and prioritize large volumes of varied documents and data. Must be able to adapt to changes in priorities, and complete tasks or projects with short notice and work with others in a cooperative manner.

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### WORK ENVIRONMENT

The position is located in Stockton and may include hybrid opportunities to telework. While in the office, incumbent works in front a single or dual-monitor computer system under artificial lighting in an office building. Due to periodic problems with heating and air conditioning, the building temperature may fluctuate. Long periods of working in a sitting or standing position, and walking to collaborate with other areas may be required. Must be able to work with a keyboard and focus on complex tasks for long periods of time. Overtime and weekend work, as well as travel may be required.

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. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

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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.

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EMPLOYEE (Print)

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

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SUPERVISOR (Print)

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SUPERVISOR (Signature)	DATE
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