

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

Proposed/Current

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Business Operations/Facilities Operations	
WORKING TITLE Facilities Budget, Planning, Sustainability & Lease Coordinator	POSITION NUMBER 5010-904-051-5393-036	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

**GENERAL STATEMENT:**

Under the general supervision of the Supervisor I, in the Facilities Operations Branch under the Office of Business Operations, the Analyst II performs technical, analytical and staff administrative support activities related to the district facilities budgets, project planning, lease coordination and sustainability related activities. Provides expert advice and consultation to district management on budgeting and facilities project planning including deferred maintenance issues. The incumbent will ensure quality assurance and quality control through project management tools and techniques for projects and contracts. The position is responsible for communication with various levels of management and stakeholders on project status.

**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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Equity, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety First, Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **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 First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, 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 First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity)
- **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 First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity)
- **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 First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, 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 First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
20%	E	<b>Budget Preparation and Monitoring:</b> Responsible for gathering and evaluating budget and expenditure data from District 4 Office of Business Operations budget. Budget includes fixed costs, recurring contract costs, recurring maintenance projects, deferred Facilities projects, day to day operational costs and personnel service dollars. Fixed costs include but are not limited to lease payments, DGS overhead, janitorial and landscaping costs, elevator maintenance, pest control, etc. Recurring Contract costs include HVAC, parking lot sweeping, plumbing, etc. Recurring Maintenance Projects include roofing, painting, parking lot paving, sidewalk replacement, etc. Failure to monitor expenses could result in over expenditure of funds. Also assists in the development of proposal for the annual facilities operational budget and 5 and 10 year Facilities Plan.
20%	E	<b>Contract Administration:</b> The incumbent will be assigned a segment of the District's contracts for services provided to operate the District's facilities. Maintain standards for building care and maintenance, closely monitor and evaluate the performance of contractors to ensure performance meets the contract specifications and standards. Initiates contracts, including developing specifications for operational services and building grounds improvements. Monitor fund expenditures, approve and authorize payment of contract invoices. Initiate contract renewals as necessary and obtain necessary approvals for use of blanket funds for emergency repair and maintenance projects.
15%	E	<b>Facilities Project Planning Coordination:</b> Responsible for coordinating with HQ Division of Business, Facilities and Security (DBFS) regarding Facilities related projects for funding approvals. Monitors and updates Deferred Maintenance Schedule for budget appropriation and approvals.
15%	E	<b>Lease Coordination:</b> Responsible for lease coordination for Facilities controlled areas including the D4 District Office retail locations. Retail locations include the Cafeteria, Bank, and DayCare facilities.
10%	E	<b>Coordinates with Headquarters and District personnel at various state-owned or leased locations to ensure the building are well maintained and meet all building code regulations. Participates as the District Liaison for the State Lab Mitigation Program (SLPM). Provide Facilities Services support to Field Facilities supported by the District 4 Facilities Management. Coordinate projects for necessary repairs and services as needed. Work closely with Budgets and District management for budget and funding required.</b>
10%	E	<b>Sustainability:</b> Responsible as the D4 Facilities sustainability liaison. Will work with Sustainability Manager regarding sustainability efforts and provide reports to Facilities I. Work with Facilities Special Projects staff to implement sustainability efforts under the direction of the Facilities SSML.
10%	M	<b>Building Operations and Facilities Management:</b> The incumbent provides customer service by addressing requests and complaints in a timely manner as set forth by the Facilities Budgeting, Planning and Security Branch Chief. Coordinates with DGS staff or contractors to resolve complaints and/or initiate work orders, follow up and monitor as needed. Conducts monthly floor audits to ensure the building is well maintained and meets all building code regulations.

<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 but may act as lead worker over one or more Staff Services Analysts and/or Associate Governmental Program Analysts and other administrative staff assigned during a project.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

**Knowledge:** Incumbent is expected to have knowledge of administrative principles and practices. Must be able to comprehend and apply State policy from the State Administrative Manual, Caltrans and Department of General Services policies/procedures. Must have knowledge of State law, applicable Federal regulations and the policies, procedures and applicable regulations of the Department and control agencies, such as Department of General Services, Department of Finance and the Legislative Analyst Office; State Capital Outlay and Department budget processes as they relate to laws, rules, policies and practices related to facilities operations and planning programs utilized by the State. Incumbent is expected to have knowledge of administrative principles and practices. Must be able to comprehend and apply State policy from the State Administrative Manual, Caltrans and Department of General Services policies/procedures concerning fleet operations. The incumbent must be able to assess facility related issues and determine if the issue conflicts with regulations from the Caltrans Safety Manual, Cal/OSHA or ADA.

**ADA Notice**

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Must have the ability to: reason logically and creatively and must possess excellent interpersonal communications and ability to utilize analytical techniques, including the ability to communicate clearly, orally and in writing in resolving many building administrative and facilities problems within the District with limited supervision. The incumbent will be involved in continuous administrative problem solving associated with preparing and presenting recommendations to District and Department Management for sensitive issues and projects. Must prepare comprehensive reports and be able to analyze situations quickly and accurately to take an effective course of action. Incumbent must possess knowledge and experience in the use of personal computers. Must be knowledgeable about relational database applications and have the ability to understand business processes. Incumbent must also be familiar with various computer software including extensive knowledge of Microsoft Office.

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**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

The incumbent must adhere to legal requirements, business ethics and practices, making this position extremely sensitive. Errors in judgment and decisions may have a direct, adverse impact on the departmental programs, which could compromise the health and safety of employees or the public. Consequently, the lack of effective decision making can cost the State substantial money, time and inconvenience. An inaccurate interpretation or application of the law, failure to implement proper controls or the inability to eliminate errors could result in violation of statutory requirements. The consequence of violations includes delays and increased costs, betrayal of public trust, embarrassment to the Department, and lawsuits against the Department or Department personnel.

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**PUBLIC AND INTERNAL CONTACTS**

Internal contacts are extensive with employees of all levels; this includes occasional contact with Branch, Office and Divisional Chiefs. Contacts may vary from exchange of routine information to detailed discussion of sensitive and complex building management and security issues. Incumbent has frequent contact with Headquarters functional staff.

Public contact is frequent with the Department of General Services, California Highway Patrol, Local Law Enforcement and the Fire Department to coordinate activities, or seek assistance. Incumbent will have frequent contact with contractors, vendors and other representatives of private firms regarding product or contract specifications.

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**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Must be able to organize and prioritize large volumes of varied documents. Ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. Requires occasional bending, stooping and kneeling. Over half of the incumbent's organization's work is subject to frequently changing work situations.

This position requires interaction with a myriad of personalities. May be subject to and have the ability to handle irate public in a calm manner. Ability to respond to emotionally charged issues reasonably and diplomatically. Must deal effectively with pressure, maintain focus, and intensity yet remain optimistic and persistent, even under adversity. Must be able to establish effective working relationships. Considering and responding appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful and treats others with respect. Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjust rapidly to new situations warranting attention and resolution.

Must have the ability to multi-task, take risks, adapt to changes in priorities, and complete tasks or projects with short notice. Employee must be able to concentrate in order to review and create documents and meet strict deadlines at times. Also, must be able to implement effective strategies consistent with the project goals.

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**WORK ENVIRONMENT**

While at their base of operation, the employee will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. The incumbent will be required to change schedules and work weekends whenever project activities occur outside the normal Monday to Friday, 7:30 a.m. to 4:15 p.m. work hours. Other duties can include working in the field with possible exposure to inclement weather during these visits.

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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.)

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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