

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Division of Human Resources, Organizational Management	
WORKING TITLE Organizational Management Analyst	POSITION NUMBER 702-008-5393-XXX	REVISION DATE 04/16/2026

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 direction of the Supervisor I, the Analyst II serves as an expert resource to the Organizational Management Section providing analytical and administrative support. The Analyst II performs the most difficult position management related activities to ensure compliance with regulations, policies, laws, and rules. The Analyst II provides technical assistance, training, guidance and support to employees, supervisors and management in a variety of complex position matters. The Analyst II partners with personnel staff, department resource managers, and Division of Budget's staff and control agencies to ensure quality control for the Department's positions. The Analyst II demonstrates a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds our customers' expectations.

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. (Cultivate Excellence - Engagement, Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Strengthen Stewardship and Drive Efficiency - Engagement, 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. (Cultivate Excellence - Innovation, Integrity, 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. (Strengthen Stewardship and Drive Efficiency - Innovation, Integrity, Pride)
- **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. (Cultivate Excellence - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, 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. (Cultivate Excellence - Engagement, Innovation, Integrity)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence - Engagement, Innovation, Pride)

TYPICAL DUTIES:

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

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50%	E	Statewide analyst for the Department's Organizational Management unit (position control program). Independently works with Programs and District contacts to ensure positions are utilized timely, processes Position Action Request Forms (PARF), updates PARF log, and maintains accurate data in the Recruitment, Onboarding & Appointment Dashboard (ROAD). Analyzes and reviews Appointment Request Forms (ARF) and PARFs to verify that the requests are consistent with departmental and control agencies' position management policies. Approves PARF requests to move employees to/from the hiring capacity blanket into authorized positions and PARFs returning employees with a mandatory right-of-return to active status. Monitors authorized position and blanket capacity allocation. Reviews and approves changes in established position documents (STD. 607) to create newly budgeted positions, make changes (additions or deletions) to established positions, and submit to SCO. Partners with Division of Budgets resource staff to ensure justifications for DOF packages are of the highest quality and meet all criteria for position reclassification or transfer. Performs annual position reconciliation (Schedule 8 Report) with Division of Budgets which reconciles established positions between State Controller's Office (SCO) and the Department. Establish, abolish and change payroll headers through SCO in order to ensure payments are released. Independently advises and makes recommendations to Office of Transactions Services' managers, supervisors and Personnel Specialists on a variety of position management issues. Compiles, formats and distributes Organizational Management data and reports for management upon request. Assists with various Budget drills and report requests that may occur throughout the year. Researches and resolves complex position management issues.
35%	E	Researches the periodic position control report which lists each position wherein personnel-months expended exceeded personnel-months authorized. Initiates action to resolve and correct errors. Researches the monthly audit of employee information, and the monthly reconciliation of ROAD with SCO position information. Monitors the authorized position level for each District to ensure compliance with its position allocation as set by Division of Budgets, including the transfer of positions between Districts by Position Allocation Change Request forms (PACR). Closely monitors Limited Term position and high-level administratively established position expiration dates and proactively notifies Programs and Districts contacts to ensure employees are moved to authorized vacancies or blanket positions pending re-establishment as needed. Identifies important PARF information and notes in ROAD to ensure Classification & Hiring is aware of pending position approval requirements. On occasion may access and execute MIRS reports for distribution to the team and program management.
10%	E	Develops, implements and maintains position control procedures, documents and guides, as well as documents new procedures or guidance on position control processes for management's review and approval. Participates in system upgrade requirements, testing and implementation as required. Develops and provides training for specialists, supervisors, and program staff on the position control process. Performs other job related duties within the scope of the classification.
5%	M	Independently researches, interprets, coordinates and ensures compliance with various bargaining unit contracts, policies, regulations, laws and rules and makes viable recommendations to management.

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

This position does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must be able to perform a professional level of analytical administrative work with a high degree of complexity to resolve administrative problems and make recommendations for an effective course of action. The incumbent must reason logically and creatively. The incumbent must consult and advise on a variety of subject matters and demonstrate a capacity for assuming increasing administrative responsibility. Must grasp the essence of new information and master new technical and business knowledge. Must adjust rapidly to new situations warranting attention and resolution.

Knowledge of State Personnel Board and Department of Personnel Administration laws rules, policies, and practices; State Controller's Office automated payroll system; the Department's automated time reporting system (Staff Central); and leave accounting system. Incumbent must have the ability to effectively interpret and apply such laws and rules. Maintains cooperative working relationships with all levels of Caltrans' staff, consultants, private sector groups and representatives of State control agencies. Prepares and analyzes reports as required. Must have the ability to multi-task, adapt to changes in priorities, and

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complete tasks or projects with short notice.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for effectively planning, coordinating, and executing office policy and procedures as they relate to ability of staff to effectively provide quality position information, personnel and payroll-related services to internal and external customers. The incumbent is responsible for complying with Information Privacy laws, included Caltrans' Information Security Control Policy by protecting departmental employees' confidential and/or personally identifiable information, including, but not limited to social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employee's confidential information may damage DHR's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work with all levels of Caltrans staff and management, consultants, private sector groups and representatives of State control agencies. Must work with others in a cooperative manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal or 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; and must be able to work independently.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Employee may also have to occasionally travel to offices and field locations throughout California.

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.)

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

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION Division of Human Resources, Organizational Management	
WORKING TITLE Organizational Management Analyst	POSITION NUMBER 702-008-5157-XXX	REVISION DATE 04/16/2026

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 direction of the Supervisor I, the Analyst I will provide analytical and administrative support to the Organizational Management section. With guidance, the Analyst I performs position management related activities to ensure compliance with regulations, policies, laws, and rules. Under direction, the Analyst I provides technical assistance, training, guidance and support to employees, supervisors and management in a variety of complex position matters. The Analyst I partners with personnel staff, department resource managers, and Division of Budget's staff and control agencies to ensure quality control for the Department's positions. The Analyst I demonstrates a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds our customers' expectations.

CORE COMPETENCIES:

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35%	E	With guidance from senior staff, researches the periodic position control report which lists each position wherein personnel-months expended exceeded personnel-months authorized. Initiates action to resolve and correct errors. Researches the monthly audit of employee information, and the monthly reconciliation of ROAD with SCO position information. Monitors the authorized position level for each District to ensure compliance with its position allocation as set by Division of Budgets, including the transfer of positions between Districts by Position Allocation Change Request forms (PACR). Closely monitors Limited Term position and high-level administratively established position expiration dates and proactively notifies Programs and Districts contacts to ensure employees are moved to authorized vacancies or blanket positions pending re-establishment as needed. Identifies important PARF information and notes in ROAD to ensure Classification & Hiring is aware of pending position approval requirements. On occasion may access and execute MIRS reports for distribution to the team and program management.
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EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE