

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION D2 / Maintenance & Ops / Field Maintenance Region Office	
WORKING TITLE Maintenance Budget Analyst	POSITION NUMBER 902-610-5393	REVISION DATE 06/19/2026

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

GENERAL STATEMENT:

Under the direction of the District 02 Maintenance Region Administration and Resource Manager (Supervisor I), the Budget Analyst performs a variety of complex technical and analytical budgetary and administrative duties for the District Maintenance and Operations division, while maintaining a high level of dependability, professionalism, teamwork, confidentiality, optimism, initiative and accuracy under strict deadlines in accordance with District, Department, State and federal law, policies, procedures, rules and guidelines. Incumbent must be customer service oriented and have strong computer skills. Incumbent must possess and maintain a valid driver's license when operating State vehicles and may be required to work outside of normal work hours and travel throughout the district and to headquarters when needed.

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, Employee Excellence - 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, Employee Excellence - Collaboration, 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, Employee Excellence - Collaboration, 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, Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Safety, Employee Excellence - Collaboration, Innovation, Integrity, People First)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Employee Excellence - Collaboration, Equity, People First, 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, Employee Excellence - Innovation, Integrity, People First)
- **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. (Safety, Equity, Employee Excellence - Collaboration, People First, 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, Employee Excellence - Collaboration, Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

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

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50%	E	Develops, monitors, manages, and analyzes allocations and expenditures/encumbrances for District 02 Maintenance & Operations. Develops comprehensive ad hoc reports and conducts monthly budget meetings for Managers - reflecting expenditures, spending trends, projections and allocation proposals. Advises District Maintenance Resource Manager of potential budgetary shortfalls and provides recommendations. Investigates current and historical data and compiles findings for monitoring, projections and cross-allocation purposes. Responds to requests from the District Budgets Office, State Highway Operation and Protection Program (SHOPP) Coordinator, Maintenance Managers, and HQ Maintenance. Prepares monthly and quarterly reports as required by HQ Maintenance. Works directly with the District Maintenance Resource Manager and District Budget Office to resolve expenditure and encumbrance errors as needed. Works directly with Deputy District Director, District Maintenance Resource Manager, and Maintenance Senior staff in the development of the annual sub-allocations (PYs) and other budget-related items.
20%	E	Provides guidance regarding proper charging procedures, including reporting codes, project numbers, object and activity codes. This also involves interacting with Maintenance Management, Maintenance Region Office and Region Support Office staff, District Resources staff, SHOPP Coordinator, and District Integrated Maintenance Management System (IMMS) Coordinator on reporting improvements, contracts expenditures and data accuracy. Researches and analyzes expenditure data and corrects charging errors through HQ Accounting. Tracks Highway Maintenance (HM) project funding and advises Pavement Coordinator on HM budget. Works with District Budget Office and Pavement Coordinator on supplementing HM projects and is responsible for requesting revision or closure of HM projects.
10%	E	Complies with State and departmental procurement rules and regulations. Maintains proper documentation of all purchases and provides assistance to Maintenance program coordinators to meet required reporting requests. Works with the Storm Water Coordinator in District 2 Roadside Maintenance to compile data for storm water audits and any special requests as needed.
10%	E	Serves as backup and works closely with the Traffic/Planning Budget Analysts; analyzes and coordinates the development of Traffic Operation and Planning's annual resource budgets. Monitors positions, personal services and operational expense budget allocations and attends program budget meetings. Corresponds with other programs and districts on budgetary issues.
5%	E	Attends and participates in all relevant Headquarters, Region Office, and District Office meetings, trainings, etc., and takes notes. May provide training to other staff. Travel may be required.
5%	M	Acts as backup for the Region Office staff. May assist Maintenance Engineering staff during emergency situations such as storm damage incidents. May assist or act as backup for the Evacuation Zone Monitor for Maintenance Engineering staff - maintaining radio contact with the Emergency Coordinator during evacuations and monitor the employee roster for assigned zone.

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. Provides training and guidance to employees. May act in lead capacity in the absence of the Supervisor when designated.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must be able to plan, prioritize and analyze data from multiple sources; be able to analyze project workload and schedules, including frequently changing workload demands and sensitive issues; be highly organized; and be able to effectively communicate with all levels of Caltrans staff. Must have the ability to motivate and persuade other functions to complete workload deliverables; be able to demonstrate the ability to work and act independently and appropriately; be skillful in performing numerical and statistical calculations; and have the ability to initiate and complete tasks with little or no instruction, based on workload needs. Must be able to determine priorities and maintain accurate records.

Must be able to reason logically, have strong oral and written communication skills, use a variety of analytical techniques to resolve problems and improve processes, analyze various work situations accurately, have strong organizational skills, and make sound decisions. Must have the ability to work effectively alone or with others, and demonstrate a commitment to conduct

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business in a professional manner. A focus on continuous improvement and training is also desirable.

Must be able to produce work that is concise and clear, using correct grammar, spelling, punctuation, and structure; be able to present ideas and information, both orally and in writing, to large groups and individuals; and be proficient and able to obtain expertise in using major computer software and databases used by Caltrans, including Microsoft Word, Excel, Outlook, Powerpoint, Access, Adobe Acrobat, IMMS/MOMS (Maintenance and Operations Management Solution), Advantage, Enterprise Datalink and other applications needed to perform the essential duties of the position. Must employ good work habits such as punctuality, reliability, and accuracy.

Knowledge of and experience with the state and the department budget process is desirable. Knowledge of CGI Advantage, Enterprise Datalink, Fiscal, contracts, purchasing / procurement, and fund types is desirable. The ability to obtain this knowledge is required.

Knowledge of Field Maintenance operations, the Region's and the Department's mission, goals, core values, purpose, organization, policies and procedures is desirable; the ability to learn this knowledge is required. A working knowledge of maintenance operations and materials, tools and equipment used in highway and landscape maintenance and construction is preferred. A valid driver's license is desired; it is required when operating state vehicles. Travel in district is required.

Incumbent must be able to act independently and with initiative while using good judgment and maintaining positive working relationships with supervisors, managers, and other staff. Must be able to effectively identify and analyze problems; evaluate information from regulations, departmental policies, laws, and/or rules; determine accuracy and relevance; consider the effect of changes; and propose solutions. Must be able to follow oral and written directions, evaluate situations accurately and take effective action.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Incumbent is responsible for both personal services dollars and operating expense funds of the Maintenance Division, including cross-allocations to and from other Programs. This position requires the incumbent to ensure confidentiality in all dealings with budget information.

Errors in calculations, predictions and judgment and the loss of confidentiality of sensitive budget information would have serious effects on the Maintenance function. Failure to carry out the above identified duties, including the over-expenditure of the budget allocations, may result in inaccurate records, additional costs to the department, over-expenditure of budget, degradation of relationships with external parties and agencies, noncompliance with applicable policies and laws, inconvenience to customers, delays for managers, and lower credibility for the office, district and department.

PUBLIC AND INTERNAL CONTACTS

Will have daily contact with Division management and staff, Region management and staff, District employees, as well as Headquarters and district field staff. Incumbent must be able to work closely with managers and supervisors on updating and monitoring allocation and expenditure information. Incumbent ensures the public and employees are treated with consideration and respect, and must display tact, professionalism, confidentiality, and sensitivity in all communications. Employee is expected to maintain a favorable public image for the district and State. Contact with the public is minimal. Requires customer service attitude and responsiveness to customer needs.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard, mouse, phone, and video display monitors. Must have manual dexterity to operate a computer and keyboard for preparation of reports and forms. Required tasks may occasionally require bending and twisting at the neck and/or waist, stooping, squatting, kneeling, reaching above the shoulder, and moving or carrying items up to 25 pounds. Will be required to travel to various locations throughout the state or district. Incumbent must possess and maintain a valid driver's license when operating State vehicles.

Working hours will be set sometime between 0500 and 1700 hours, Monday through Friday, and it is expected that the employee will report to work on time and remain productive throughout the work day. Employee must be able to multi-task, follow instruction, adapt to changes in priorities, complete tasks or projects with short notice, have the ability to organize and process large volumes of varied data and documents, be able to concentrate in order to review, process, and analyze data and documents, and meet strict deadlines.

Employee must be able to handle pressure effectively and maintain focus and intensity yet remain optimistic and persistent, even under adversity. Must also be able to develop and maintain cooperative working relationships with all levels of staff and communicate effectively, professionally and respectfully. Employee must demonstrate a sense of responsibility with a commitment to public service, handle confidential and sensitive documents and information with appropriate tact, urgency and

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care, conduct themselves in a fair and ethical manner, and respond appropriately to difficult situations.

WORK ENVIRONMENT

While at their base operation, employee will work in a climate-controlled office under artificial lighting. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Incumbent may occasionally attend offsite meetings and travel to Maintenance facilities within the state where climate and accessibility are uncertain and may be exposed to dirt, noise, uneven surfaces, and/or extreme heat or cold.

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
