

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Project Management/ COS STWD _Budgets & Resources	
WORKING TITLE COS Statewide Resource Analyst	POSITION NUMBER 913-016-5393-011	REVISION DATE 06/17/2026

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 Supervisor I, for the Office of Statewide Resource Management, the incumbent is responsible for management of the Cost Accounting Setup (CAS)/Cost Accounting Maintenance (CAM) programs, used for authorizing the opening and closing of project phases, Project Change Request (PCR) and Emergency Director's orders. Monitoring baseline project scope, cost and schedules in the Project Resource and Schedule Management (PRSM), CGI Advantage (EFIS), California Transportation Improvement Program System (CTIPS) and the Earned Value Reporting System, to identify and implement potential changes to CAS/CAM. The incumbent is also responsible for setting Baselines, assigning Workload Flags, and removing Workload flags as requested. Reviewing, processing and logging Hiring Exemption Requests. Working with District Fleet Coordinators and Division of Equipment (DOE) to manage and utilize the Capital Outlay Support (COS) Fleet, ensuring the districts have the vehicles necessary to complete projects. Working with district budget analysts to prepare Persons On Board Equivalent (POBE) monthly report. Updating, adding and removing information to the Project Management Intranet as necessary.

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. (Employee Excellence - Collaboration, Innovation)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Pride, Stewardship)
- **Ethics and Integrity**: Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Employee Excellence - Collaboration, Equity, People First)
- **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. (Employee Excellence - Collaboration, 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. (Prosperity - Collaboration, Integrity, People First)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Innovation, Integrity, People First)
- **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. (Prosperity - Collaboration, Integrity, People First)
- **Conceptual Thinking**: Ability to find effective solutions to issues by taking the appropriate perspective (i.e., holistic, abstract, or theoretical). (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **Organizational Skills**: Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - People First, Pride)

TYPICAL DUTIES:

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

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45%	E	<p>Authorize the opening and closing of project phases CAMs. This process includes, but is not limited to: Review of BG69 and BG40 and CAS/CAM documents; and cross referencing project authorization(s), work-plan(s), budget information, directors orders, cooperative agreement(s), federal fund eligibility, PCR splits, funding authorization, program codes, and fund codes.</p> <p>Process baselines, review project scope, cost, and schedule in PRSM, including verifying project budgets by reviewing project documents, cooperative agreements, CTIPS data, PCRs, and checking schedules for valid logic. Assign Flags to projects as requested by the districts and COS Headquarters (HQ) Engineers. Assign Workload Flags to current and future projects, working in PRSM, and CTIPS, complete M800s, removal of flags as requested by the districts and COS HQ Engineers.</p> <p>Work with District Fleet Managers (DFM), Fleet Optimization Manager (FOM)s, Division of Equipment (DOE), District Fleet Coordinators, Fleet Optimization Managers, Surveys Analyst and their Supervisors, and Shop Superintendents to ensure the COS Program has the vehicles needed to deliver projects. Assist Districts in managing and maximizing fleet utilization. Prepare monthly Vehicle on Board (VOB) reports. Act as a liaison between the districts and DOE and DGS contracted leasing entity. Provide long-term lease authority to districts, monitor usage of leased vehicles and prepare monthly and quarterly lease reports for management with number of vehicles leased by district and cost of leases.. Analyze DOE reports, Fleet Optimization Utilization Report (FOUR), Emergency Specialized Variable Demand (ESVD) and Open Work Orders and filter information for the individual districts. Track leases in databases, attend DOE facilitated Bi-Monthly FOM meetings via video conferencing. Respond to HQ Capital Outlay Support (COS) request for information and assistance. Communication via email, phone, and video conferencing. Ability to work in Smart Sheet.</p>
35%	E	<p>Use CTIPs, Cooperative Agreements, Directors Orders, PCRs, PRSM, and EFIS, to verify and validate existing and proposed project baseline schedule; project budgets, and major project milestones. Communicate and coordinate with Caltrans' District Project Managers, and Resource Management staff to identify and resolve data anomalies and errors. Use and analyzed data to create and present information to Caltrans' management. Work collaboratively with District Project Control units and Caltrans' Division of Budgets to identify, troubleshoot, and correct current errors and in historical data. Proactively review and analyze budget and expenditure data in PRSM, CTIPS, EFIS, FMIS and other databases to ensure the quality of the data. Cooperatively work with other office staff, divisions in Caltrans' Headquarters, and in Caltrans' districts, to correct inaccurate, obsolete, or inconsistent project data.</p>
10%	E	<p>Review and analyze Hiring Exemption Requests for completeness, all required documents, justifications when required, and signatures for approval by COS Program management. Review and monitor Hiring Exemption Delegations for the districts. Input Hiring Exemption Request into Exemption Request database and the completed Exemption file folder.</p>
5%	M	<p>Research, develop, and recommend improvements to current project management policies, business practices, memoranda, manuals, and other guidance documents.</p>
5%	M	<p>Perform other duties as required.</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

The Analyst II does not supervise other employees; however may act in the absence of the Supervisor I.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must be able to work professionally and present information clearly and logically, both verbally and in writing to supervisor, employees, and the public. Using a variety of techniques, identify and resolve issues; and have some knowledge of regulations, policies, procedures, principals and general project management.

Knowledge of personal computer systems and computer application programs (i.e. Microsoft Word, Excel, Outlook and Power Point). Must have the ability to create database spreadsheets, graphs, charts and reports.

Must have the ability to communicate effectively with all levels of management and staff orally, in writing, and with visual aids.

Must be able to exercise good judgment on matters relating to project management and capital program delivery.

Must have the ability," to learn quickly.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for independent action and initiative in carrying out assigned duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate actions. Poor decisions may result in

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(1) inaccurate representation of project data, (2) loss of credibility with decision makers and/or (3) the development of inaccurate recommendations on which others rely.

PUBLIC AND INTERNAL CONTACTS

The incumbent must interact with Project Managers, Districts Budgets unit, Program/Project Management Support Units and HQ units, including but not limited to Divisions of Accounting, Budgets, and Transportation Programming. The incumbent must work cooperatively and effectively in a team environment with Districts, Division of Engineering Services and Headquarters staff. The incumbent must also prepare and make presentations to Headquarters and District managers as required.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee will be required to sit for long periods of time using a keyboard and video display terminal, develop and maintain cooperative working relationships, and focus for long periods of time. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

WORK ENVIRONMENT

Employee will be working a hybrid schedule. When working in the office employees will be working in a climate-controlled office under artificial light. Employees may be required to travel in state. Frequency of travel is expected to be very low.

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 headquarter location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquarter location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. For permanent and limited term appointments, all commute expenses to the headquarter location will be the responsibility of the selected candidate.

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