

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION D5 DHR/Statewide Liaison Services/Central CA	
WORKING TITLE District 5 Human Resources Liaison	POSITION NUMBER 702-008-5393-XXX	REVISION DATE 06/10/2026

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 Branch Chief, a Supervisor I, in the Division of Human Resources (DHR), the incumbent works as the District's Human Resources Liaison (HRL). The HRL independently provides technical guidance to managers and supervisors regarding current personnel issues, policy and procedure changes, and policy implementation. The HRL demonstrates a positive attitude, and commitment to providing quality service that is accurate, timely, and exceeds our customers expectations, expectations, and maintains complete confidentiality. The HRL may be required to travel to other district offices as needed to assist with other DHR functions.

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. (Equity - Integrity, People First, Pride)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Equity, Innovation, Integrity, People First, Pride)
- **Initiative**: Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - Equity, 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. (Employee Excellence - Collaboration, Equity, Integrity, Pride)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Equity, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Equity, Integrity, Pride)
- **Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Employee Excellence - Collaboration, Equity, Integrity, People First, Pride)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation, Integrity, 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. (Employee Excellence - Equity, Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	The Human Resources Liaison (HRL) independently advises management and supervisory staff on responding to routine personnel issues, including duties related specifically to the Family and Medical Leave Act (FMLA): Serves as the primary contact for FMLA matters within the district. Advises district management and supervisory staff on FMLA procedures and requirements. Meet with employees, supervisors, and managers to explain FMLA processes and provide guidance to address concerns. Respond to questions related to FMLA, ensuring clarity and support throughout the process. Help employees understand how to apply for Nonindustrial Disability Insurance and State Disability Insurance through EDD, as these may be relevant during FMLA leave. Ensure all FMLA-related issues are resolved within legal time frames required by applicable regulations. The HRL independently provides expert advice and consultation to the District Executive staff regarding personnel issues. This involves effective communication with district management to build understanding and strengthen cooperation with DHR's policies and procedures in accordance with State laws and rules that govern personnel operations. Knowledge of the Department's program goals and objectives, policies, and procedures, employment laws, and the Government Code is expected. The HRL serves as the central point of contact for staff, supervisors, and managers regarding Reasonable Accommodation (RA). Their primary duties include: Advising district management and supervisory staff on personnel and labor relations matters related to Reasonable Accommodation, and interpreting relevant policies and procedures. Providing guidance and support to employees seeking Reasonable Accommodation, ensuring that staff members understand their rights and the process for requesting accommodations. Meeting with staff, supervisors, and managers to explain the Reasonable Accommodation procedures, address questions, and offer general guidance to facilitate a smooth and supportive process. Ensuring every Reasonable Accommodation request is managed and resolved within the time frames mandated by applicable laws and regulations, maintaining compliance throughout. Referring complex or challenging Reasonable Accommodation issues to the Department's RA Coordinator to ensure alignment with statutes, rules, and regulations established by the State Personnel Board (SPB), Department of Fair Employment and Housing (DFEH), and the Equal Employment Opportunity Commission (EEOC).
30%	E	The HRL provides technical guidance to managers and supervisors on the initial phases of the progressive discipline process (i.e., verbal warnings and corrective interview memos), in accordance with established principles of discipline by: (1) advising supervisor/manager on documentation required; (2) reviewing memos to ensure completeness, and that proper grammar, spelling, and punctuation guidelines are applied, and (3) reviewing requests for adverse action prior to obtaining signature to ensure completeness. Refers disciplinary issues involving workplace violence, discrimination, sexual harassment, and theft or where an internal/external investigation has been conducted to the Office of Discipline Services in Headquarters. The HRL independently review requests for adverse action prior to obtaining signature to ensure completeness. The HRL coordinates and serves Notices of Adverse Actions and Rejection During Probation received from the Office of Discipline Services for the District. Serves as the contact person for employee/representative when an action is served. Schedules Skelly/Coleman hearings and notifies necessary parties. Provides relevant documents to the Skelly/Coleman Officer prior to the hearing and timely notification to the signing authority and the Office of Discipline Services of the Skelly/Coleman Officer's recommendation. May be required to serve as a note taker at an actual Skelly/Colman meeting as needed.
10%	E	Review and evaluate requests for adverse actions and probationary rejections submitted by the Office of Performance Support (OPS) or Office of Discipline Services (ODS). Serve as the primary contact for employees and their representatives during disciplinary actions, coordinating Skelly/Coleman hearings, notifying all relevant parties, ensuring officers have necessary documentation, and communicating recommendations to signing authorities, OPS and ODS. Assist with administrative tasks during Skelly/Coleman hearings, such as note-taking when required.
10%	E	The HRL provides support at the district level to the DHR Examination Program and serves as chief proctor on non-MSP examinations, receiving, auditing, and securing examination materials. The HRL is expected to comply with civil service rules and regulations regarding the administration and security of examinations, as well as the written guidelines set forth in the Caltrans Examination Security Procedures for Liaisons.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

10%	M	The HRL independently develops and conducts training on various Human Resources topics for District Supervisors and Managers. Training may include, but is not limited to Annual Performance Reviews, the Individual Development Plan process, Supervisor Training Program, New Employee Orientation, FMLA/CFRA, and RA's. The HRL may serve as the backup to the District Transaction Liaison by assisting employees regarding the hiring process, benefits, pay and leave balances, and any other personnel-related issues. The District HRL is expected to provide coverage to other district offices as needed and may assist on special projects/assignments as needed.
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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

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The Human Resources Liaison is expected to be knowledgeable and able to interpret and apply laws, rules, policies, and practices related to personnel operations in state government. The HRL must be familiar with and have knowledge of Caltrans's Mission, Vision, Values, and Goals. The HRL must be familiar with the State's progressive discipline process and be able to advise managers and supervisors on appropriate methods of supervision. The HRL must be able to reason logically, use analytical skills, and research techniques to solve difficult personnel problems, use good judgment, draw valid conclusions, and make recommendations for the appropriate course of action. Additionally, the HRL must be able to express ideas and present information clearly and logically, both orally and in writing to managers, supervisors, and employees. The Liaison must know how to type and have knowledge of various computer applications such as Word, Excel, PowerPoint, and the Internet. Must be able to give oral presentations to groups of employees within the Department. The HRL will be expected to review and evaluate requests from managers and supervisors that cover a broad range of personnel issues. The HRL will develop technically sound alternatives that may include developing new approaches and organizational changes or revisions. The HRL must be able to provide thorough and complete staff work on personnel-related issues and meet the needs of the operational units.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The HRL makes decisions that may be sensitive in nature and, if necessary, require discussion with the supervisor. Poor decision-making could result in failure to properly resolve employee issues, inappropriate action(s) being taken against an employee, financial liability, and/or discredit to the department. Must be able to act responsibly and independently. Liaisons must research existing policies and rules prior to making any recommendation(s) on how to handle any specific issue. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the Division of Human Resources' reputation as a confidential organization, may result in employee grievances or lawsuits, and under California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS

The HRL confers with all levels of management and staff in Caltrans and with employee representatives (union representatives, personal attorneys, etc) in their daily activities. They also consult with staff from various control agencies for guidance and assistance.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for prolonged periods and use a computer keyboard and monitor. Must be able to develop cooperative working relationships. The HRL may be required to move large or cumbersome manuals and/or equipment from one location to another. Must be able to attend off-site meetings regularly and must be able to travel to Headquarters occasionally. Sustained mental activity will be required for problem-solving, analysis, and reasoning. Ability to recognize emotionally charged issues or problems and have the ability to respond appropriately to difficult situations. Must be able to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. The HRL will interact with the public and employees at all levels within the department and other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse cultural backgrounds.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office at workstations within cubicles under artificial lighting. Incumbents may also be required to travel throughout the state of California for training purposes and work outdoors where exposure to dirt, noise, uneven surfaces, and/or extreme cold or heat.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst I	D5 DHR/Statewide Liaison Services/Central CA	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Human Resources Liaison	702-002-5157-XXX	06/10/2026

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

GENERAL STATEMENT:

Under the general direction of the Branch Chief, a Staff Services Manager I in the Division of Human Resources, the incumbent works as the District's Assistant Human Resources Liaison (HRL). The Assistant HRL independently provides technical guidance to managers and supervisors regarding current personnel issues, policy and procedure changes, and policy implementation. The HRL demonstrates a positive attitude, and commitment to providing quality service that is accurate, timely and exceeds our customers' expectations, and maintains complete confidentiality. The Liaison may be required to travel to other district offices as needed to assist with other DHR functions.

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. (Employee Excellence - Collaboration, 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. (Employee Excellence - Equity, Innovation, Integrity, Pride)
- 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, Innovation, Integrity, People First, 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. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Equity, Integrity, People First, Pride)
- Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Equity, Integrity, People First, Pride)
- Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Employee Excellence - Collaboration, Equity, People First, Pride)
- 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. (Employee Excellence - Collaboration, Equity, Innovation, 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. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
30% E	Serve as the District Office Family and Medical Leave Act (FMLA) Liaison. Provide guidance to district management and supervisory personnel on addressing and resolving inquiries related to routine personnel and labor-relations matters, as well as less complex RA and FMLA issues. Facilitate meetings with district staff and supervisors/managers to ensure RA and FMLA processes are carried out in compliance with all applicable laws, regulations, and required time-frames. When appropriate, consult with the district's Staff Services Manager I/II, Analyst II, or the Department's RA/FMLA Coordinator to confirm that all actions align with departmental policies and governing statutes.

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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

20%	E	The HRL provides support to the Analyst III, Discipline Coordinator, by assisting with routine, early-stage components of the progressive discipline process. Under guidance, the HRL helps supervisors and managers understand basic documentation needs for initial actions such as verbal counseling and corrective interview memos. This includes reviewing draft memos for completeness and clarity, ensuring proper formatting, grammar, and accuracy. The HRL supports the scheduling of Skelly or Coleman hearings by notifying the appropriate parties and collecting or preparing routine documents for the Skelly/ Coleman Officer. When requested, the HRL may attend a hearing to take notes or provide basic logistical support. The HRL may also help coordinate the service of Notices of Adverse Action and Rejection During Probation received from the Office of Discipline Services, serving as a point of contact for the employee or representative when needed.
20%	E	Provides support to employees, supervisors, and managers in responding to questions related to benefits, pay and leave balances, retirement, and any other benefit-related personnel matter. Performs the necessary research required to resolve questions on these issues. If necessary, refers technical questions to the Human Resources Division (HQ) or the District Human Resources Liaison. Ensures that all personnel documents (i.e., health, dental, vision, etc.) are completed accurately and submitted to the assigned Personnel Specialist by no later than the following business day from the date the document was received. Assists employees with the completion of necessary forms, answers questions pertaining to forms, benefits, and payroll, and provides information on all benefit-related programs available to State employees.
10%	E	In the absence of the lead Human Resources Liaison (HRL - Analyst II), arranges for and ensures the service of actions issued by the District. Serves as the contact person for employee/representative when an action is served, schedules Skelly and Coleman hearings, notifies all parties, provides the Skelly/ Coleman Officer with all relevant documents prior to the Skelly/Coleman meeting, and provides timely notification to all parties of the Skelly/Coleman Officer's recommendation as a result of the meeting.
10%	E	The HRL provides support at the District level to the DHR Examination Program and serves as Chief Proctor on non-MSP examinations when the HRL is absent. The Assistant HRL also receives, audits, and secures examination materials. The Liaison is expected to comply with civil service rules and regulations regarding the administration and security of examinations, as well as the written guidelines set forth in the Caltrans Examination Security Procedures for Liaisons.
10%	M	The HRL will assist the Analyst II HRL or Supervisor I to conduct training on various Human Resources topics for District supervisors and managers. This training will include but is not limited to FMLA/CFRA, and Reasonable Accommodation. Training may be conducted in each District Office regarding personnel procedures and supervisory responsibilities to ensure that existing and newly appointed managers and supervisors are aware of the most current Human Resources processes and information. May be required to travel to assist with department's career fairs or open enrollment health fairs.

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MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The Human Resources Liaison is knowledgeable and able to interpret and apply all laws, rules, policies, and practices related to personnel operations in State government. The Liaison must be familiar with and have knowledge of Caltrans mission and goals, policies and procedures, and be able to apply the personnel management program needed to accomplish them. The Liaison must be able to reason logically, use analytical and research techniques to solve difficult personnel problems, use good judgment, draw valid conclusions, and make recommendations for the appropriate course of action. Additionally, s/he must be able to express ideas and present information clearly and logically, both orally and in writing to managers, supervisors, and employees. The Liaison must know how to type and have knowledge of various computer applications such as Word, Excel, PowerPoint, and the Internet. Must be able to give oral presentations to groups of various sizes and levels of the Department. The Liaison will be expected to review and evaluate requests from managers and supervisors that cover a broad range of personnel issues. S/he will develop technically sound alternatives that may include developing new approaches and organizational changes or revisions. S/he must be able to provide thorough and complete staff work on personnel-related issues and meet the needs of the operational units.

POSITION DUTY STATEMENT

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Human Resources Liaison makes decisions that may be sensitive and, if necessary, require discussion with the supervisor. Poor choices could fail to resolve employee issues properly, inappropriate action(s) being taken against an employee, financial liability, and/or discredit to the department. Must be able to act responsibly and independently. Liaisons must research existing policies and rules before making any recommendation(s) on handling issues. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the Division of Human Resources (DHR) reputation as a confidential organization, resulting 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 Human Resources Liaison confers with all levels of management and staff in Caltrans, and with employee representatives (union representatives, personal attorneys, etc) in his/her daily activities. They also consult with staff from various control agencies for guidance and assistance.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for prolonged periods and use a computer keyboard and monitor. Must be able to develop cooperative working relationships. At times the Liaison may be required to move large or cumbersome manuals and/or equipment from one location to another. Must be able to attend off-site meetings regularly and must be able to travel to Headquarters occasionally. Sustained mental activity will be required for problem-solving, analysis, and reasoning. Ability to recognize emotionally charged issues or problems and respond appropriately to difficult situations. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on short notice. Analysts interact with the public and employees at all levels within the department and other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse cultural backgrounds.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office at workstations within cubicles under artificial lighting. Incumbent may also be required to travel to and from Central California District Offices and Headquarters, and work outdoors where s/he may be exposed to dirt, noise, uneven surfaces, and/or extreme cold or heat.

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

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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