

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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| CLASSIFICATION TITLE Analyst II | OFFICE/BRANCH/SECTION District 4 North Bay Region | |
| WORKING TITLE Contract/Training Analyst | POSITION NUMBER 904-610-5393-xxx | REVISION DATE 02/12/2026 |

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 a Staff Services Manager I and/or Maintenance Manager I or II, the Analyst II independently performs complex analytical, fiscal, and contract management functions for the North Bay Region Maintenance Division. The incumbent is responsible for advanced analysis, preparation, monitoring, and reporting of budgetary and fiscal data and ensuring compliance with labor regulations, prevailing wage requirements, purchasing policies, contracts, and accounting procedures. The Analyst II serves as a primary contract manager for multiple service contracts and provides expert-level consultation to management regarding budget, procurement, and contract administration. This position requires independent judgment, interpretation of policies and procedures, and development of recommendations to resolve complex fiscal and operational issues. Some travel may be required. A valid driver's license is required. This is an in-office position.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Safety, Employee Excellence - Collaboration, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity - 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. (Equity, Employee Excellence - 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, Pride)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Employee Excellence - Collaboration, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Integrity)
- **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, 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. (Employee Excellence - Collaboration, Integrity, Pride)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Employee Excellence - Collaboration, Integrity)

TYPICAL DUTIES:

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

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| 30% | E | Independently performs complex analytical duties in support of regional budget and contract operations. Provides technical expertise to regional staff in tracking, researching, and managing budget encumbrances and disencumbrances, Cal-Card purchases, procurement activities, contracts, Contract Delegation Purchase Orders (CDPOs), and Request for Service (RQS) processes for all maintenance materials and services. Collects, validates, researches, and analyzes fiscal and contract data from field supervisors and superintendents to ensure accuracy and compliance with departmental policies and fiscal controls. Reviews and reconciles CDPO expenditures against the Region's budget database and financial systems to ensure alignment with approved funding levels, contract terms, and expiration dates. Prepares and analyzes monthly financial and contract reports in coordination with the District Budget Liaison. Identifies discrepancies, trends, and potential funding shortfalls and develops recommendations for corrective action. Conducts in-depth research using reports from Headquarters Maintenance, Accounting, DPAC, and District Budget Offices to resolve complex contract, budget, and accounting issues. Interprets fiscal policies and procedures and ensures compliance with all applicable requirements. Assists with the evaluation, development, and monitoring of service contracts for the Maintenance Division and provides analytical support to regional management regarding fiscal and contract-related decisions. |
| 30% | E | Serves as Contract Manager for multiple service contracts. Conducts field reviews and documents all charges made against service contracts. Oversees the full contract lifecycle, including development, administration, monitoring, and close-out. Verifies labor compliance and payroll charges and ensures adherence to prevailing wage laws and regulatory requirements. Researches, analyzes, and develops contracts including but not limited to Service Contracts, Emergency Rental Equipment, Emergency Force Account, Emergency Limited Bid, Emergency Minor B, Architectural Engineering, and related agreements. Manages and monitors vendor invoicing and authorizes final payment for satisfactorily completed services. Maintains complete and accurate contract documentation and audit trails. Provides consultation and guidance to other Contract Managers by preparing contract strategies, analyzing contract performance, and making recommendations regarding budget status and funding projections. Coordinates the annual contract process with service providers and provides regular and ongoing reports to management regarding current and prior fiscal year contract expenditures and trends. |
| 30% | E | The incumbent serves as the Regional Training Coordinator for the Maintenance Division and is responsible for coordinating, monitoring, and evaluating regional training activities. Independently analyzes training needs based on operational requirements, staffing levels, compliance mandates, and performance trends. Develops and maintains training schedules and ensures timely completion of mandatory and job-specific training for regional staff. Coordinates with District and Headquarters Training Units to implement departmental training programs and communicates training requirements to supervisors and employees. Tracks training participation and completion using departmental systems and prepares reports for management regarding compliance, training effectiveness, and resource needs. Provides guidance and technical assistance to supervisors and staff regarding training policies, procedures, and documentation requirements. Identifies gaps in training coverage and recommends corrective actions to management to ensure compliance with State and departmental standards. Maintains accurate training records and supports audits and reviews related to workforce development and compliance. |
| 5% | M | Provides advanced statistical analysis and prepares reports for the Region Manager I/II and Staff Services Manager I regarding operational budget needs and future staffing requirements based on spending trends and workload data. Utilizes Microsoft Office applications, including Excel, to analyze, develop, and present financial and operational reports. Develops data-driven recommendations to support management decision-making. |
| 5% | M | Provides analytical and operational support to regional office staff as needed, including purchasing, Cal-Card processing, and responding to inquiries from internal staff, the public, and governmental agencies. Assists with maintaining office operations such as answering phones, filing, mail distribution, and coordination of office equipment when required. Serves as a subject matter resource for fiscal and contract-related questions within the region. |

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 incumbent does not have formal supervisory responsibility but provides functional guidance, technical direction, and training to regional staff and Contract Managers regarding budget tracking, contract administration, labor compliance, and fiscal procedures. The Analyst II serves as a subject matter expert and provides consultation to ensure compliance with departmental

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policies and procedures. The incumbent also provides functional guidance to supervisors and staff in meeting training requirements and serves as the regional point of contact for training coordination and compliance.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must possess knowledge of the principles and practices of governmental budgeting, accounting, and fiscal management; contract development, administration, and monitoring processes; labor compliance and prevailing wage laws and regulations; and State and departmental policies, rules, and procedures related to procurement and contracts. The position also requires knowledge of data collection, statistical analysis, and reporting techniques, automated financial and contract management systems, and Microsoft Office applications, particularly Excel. The incumbent must have the ability to independently analyze complex fiscal, contract, and operational data; interpret and apply laws, regulations, and policies; develop recommendations based on data analysis and program evaluation; and prepare clear, concise, and accurate written reports and correspondence. The ability to communicate effectively with management, staff, vendors, and external agencies, organize work, manage multiple priorities, and meet deadlines is essential. The incumbent must maintain confidentiality and exercise sound judgment in all aspects of work. Work requires the application of advanced analytical techniques to identify trends, discrepancies, and potential problem areas. The incumbent must evaluate multiple data sources, interpret regulations and policies, and formulate recommendations that directly impact regional fiscal operations and contract performance. Knowledge of training coordination practices, workforce development principles, and departmental training policies is required

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent exercises independent judgment in analyzing fiscal and contract data and in administering service contracts. Errors in judgment or analysis could result in financial loss to the Department, contract noncompliance, audit findings, service delays, or violations of State and federal regulations. Accurate analysis and sound decision-making are critical to maintaining fiscal integrity, operational efficiency, and public trust.

PUBLIC AND INTERNAL CONTACTS

The incumbent maintains regular contact with internal staff including management, supervisors, field staff, Contract Managers, Accounting, Budget, and Headquarters personnel to provide consultation and resolve fiscal and contract-related issues. External contacts include vendors, service providers, and representatives from public and private agencies to coordinate contract services, resolve billing discrepancies, verify labor compliance, and ensure contract requirements are met. These contacts require professionalism, diplomacy, and the ability to explain complex fiscal and contractual information clearly. The incumbent coordinates regularly with District and Headquarters Training Units, supervisors, and employees to implement and monitor required training programs

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Work is primarily sedentary and performed in an office setting and requires sitting for extended periods and frequent use of a computer, telephone, and standard office equipment. The position may involve occasional walking, standing, bending, and light lifting of files or materials weighing up to 25 pounds. The incumbent must sustain concentration, analytical thinking, problem-solving, and attention to detail in order to evaluate complex fiscal and contractual information and make sound decisions under time constraints. The position also requires the ability to work effectively under pressure, meet deadlines, manage competing priorities, and interact professionally with staff, vendors, and the public. The incumbent must exercise patience, tact, and diplomacy when resolving disputes or addressing sensitive fiscal or contractual matters.

WORK ENVIRONMENT

Work is performed in an office environment with shared workspace, adequate lighting, and climate control. The position requires frequent use of computers and other office equipment. Some travel may be required for field reviews, meetings, or training purposes. The incumbent must possess and maintain a valid driver's license. This is an in-office position.

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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.)

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