

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst I	Business Operations/Logistics Operations	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Mail room Contracts / Budgets Analyst i	904-051-5157-007	04/15/2026

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

GENERAL STATEMENT:

Under the supervision of the Supervisor I, the Analyst I functions as the primary analyst for the District's mailroom operations and provides analytical and administrative support to the Logistics Operations Branch. The incumbent performs a wide variety of analytical assignments related to mail room operations, including coordination of mail processing activities, service and vendor support, invoice review, Cal-Card reconciliation, payment tracking for GLS, USPS, and other mail-related services, encumbrance monitoring, records management, and preparation of reports and correspondence. The Analyst I works in coordination with one other analyst and two Office Technicians assigned to the mail room to ensure operational efficiency, consistency, accuracy, and compliance with departmental policies and procedures. The incumbent exercises initiative, sound judgment, and analytical skills in reviewing operational and fiscal documents, resolving administrative issues, identifying process improvements, and supporting the overall effectiveness of the District's mailroom program.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, 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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

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

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35%	E	The Analyst I provides analytical, administrative, and operational support for the District's Mail room program. The incumbent performs a variety of duties related to the coordination, monitoring, and administration of mail room contracts, service agreements, and fiscal processes. The Analyst I reviews, analyzes, and tracks mailroom-related expenditures and service activity for vendors such as GLS, USPS, and other mail or delivery service providers. The incumbent analyzes invoices, reconciles billing charges and Cal-Card transactions, processes payments, maintains expenditure and encumbrance tracking logs, and ensures all supporting documentation is complete, accurate, and in compliance with departmental requirements. The Analyst I assists with the development, implementation, and revision of mail room procedures and workflows to improve efficiency, accountability, and consistency of operations. The incumbent identifies and resolves routine billing and contract issues, coordinates with vendors and internal staff regarding service and payment matters, and supports contract administration by maintaining service records, tracking agreement activity, and assisting with amendments or updates when needed. The Analyst I prepares reports, maintains related files and databases, and ensures work is performed accurately, timely, and in accordance with departmental policies and established procedures.
30%	E	The Analyst I reviews and analyzes existing and proposed administrative policies, procedures, and operating practices as they pertain to the District's Mailroom program. The incumbent researches applicable state, departmental, and district policies and procedures; evaluates their impact on mailroom operations; and prepares recommendations for management regarding process improvements, policy updates, and procedural changes. The Analyst I develops and maintains clear procedures for implementation within the mailroom and related logistics operations. The incumbent performs studies and special projects related to mail service operations, including postage usage, courier services, shipping processes, and internal mail distribution. The Analyst I continually monitors available funding and expenditures for mail-related services and equipment to ensure operational needs are met throughout the year and identifies when additional resources or adjustments may be necessary.
15%	E	The Analyst I consults with management on project coordination and operational support activities related to the District's Mail room program. Duties may include updating and analyzing project schedules, preparing resource estimates, reviewing expenditure reports, tracking funds for courier services, postage, shipping activity, and related mailroom contracts, and preparing miscellaneous technical and administrative reports. The incumbent analyzes requests related to mail service operations, distribution processes, delivery procedures, and internal customer support needs, taking into consideration budget, staffing, and operational priorities. The Analyst I is responsible for creating and maintaining tracking systems, databases, and distribution records necessary to support the accurate and efficient delivery of incoming and outgoing mail, packages, accountable mail, and internal distributions throughout the District.
10%	M	The Analyst I acts in a lead capacity within the District Mailroom and provides day-to-day direction, coordination, and operational support to two Office Technicians assigned to the unit. The incumbent assists with organizing and prioritizing workload, assigning routine tasks, providing training and procedural guidance, and monitoring work for accuracy, timeliness, and compliance with established procedures. The Analyst I supports staff in responding to routine and unusual mailing, shipping, delivery, and distribution issues, and helps coordinate solutions to operational problems to ensure continuity of services. The incumbent assists in maintaining efficient daily mailroom operations and promotes consistency, accountability, and quality customer service in support of District needs.
5%	M	The Analyst I performs administrative, operational, and program support duties related to the District's Mailroom program. The incumbent maintains records, files, logs, and tracking systems associated with mailroom services; prepares correspondence, reports, and supporting documentation; and assists in monitoring service requests, supply levels, equipment needs, and workflow issues to support efficient and uninterrupted operations. The Analyst I coordinates with internal staff, vendors, and service providers regarding routine mailroom matters and helps ensure mail processing, package handling, accountable mail, and internal distribution activities are completed accurately, timely, and in accordance with established procedures. The incumbent also supports audit readiness, records retention, and compliance efforts by maintaining complete and organized documentation and assisting with the review of operational records and related materials.
5%	M	Provide support for special projects or initiatives assigned by the Supervisor I or Branch Chief. Tasks may include preparing reports, assisting with internal audits, updating administrative procedures, and supporting sustainability and efficiency initiatives within the Logistics Operations Branch. Perform other related duties as necessary to ensure effective and continuous support for branch operations.

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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

The Analyst I acts in a lead capacity and provides day-to-day direction and guidance to two Office Technicians assigned to the District 04 Mail room. The incumbent assists with organizing workflow, assigning routine tasks, providing training and procedural support, and monitoring work for accuracy, timeliness, and compliance with established procedures. The Analyst I does not have formal supervisory responsibility, but serves as a lead resource to support daily mail room operations.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

Basic principles and practices of public administration, including budget tracking, management analysis, and administrative operations. State and departmental policies and procedures related to mail room operations, procurement, contract administration, invoice processing, Cal-Card reconciliation, records management, and internal controls. Mail processing procedures, shipping and delivery service coordination, postage and courier operations, and accountability requirements for incoming and outgoing mail and packages. Office software applications, including Microsoft Excel, Word, Outlook, and database or tracking systems.

Ability to:

Analyze and interpret data, policies, procedures, invoices, and expenditure records to make sound recommendations. Plan, organize, and prioritize multiple assignments to meet deadlines in a fast-paced mailroom environment. Communicate effectively both orally and in writing with staff, management, vendors, and service providers. Work independently and collaboratively in a team environment. Maintain confidentiality and handle sensitive or time-sensitive information with discretion. Provide day-to-day lead direction, training, and guidance to two Office Technicians assigned to the mailroom. Learn and apply new systems, software, and procedures quickly and accurately.

Analytical Requirements:

Evaluate mail room processes and procedures for efficiency, accuracy, and compliance. Track and monitor contract expenditures, service agreements, encumbrances, invoices, and payment activity related to mailroom operations. Review billing documentation and Cal-Card transactions to ensure accuracy, completeness, and timely processing. Identify areas for improvement in mail room workflows and recommend practical solutions. Interpret and apply departmental policies related to mail handling, service coordination, recordkeeping, and administrative procedures.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for making decisions and recommendations within the scope of established policies, procedures, and guidelines. Accuracy, attention to detail, and sound judgment are essential in performing duties related to mail room operations, contract coordination, invoice review, payment processing, Cal-Card reconciliation, encumbrance tracking, and administrative support.

Errors in judgment or failure to follow procedures may result in: Delayed or inaccurate payment of invoices for mail room services, including GLS, USPS, and other delivery or shipping vendors.

Mismanagement of contract documentation, encumbrances, or expenditures, resulting in audit findings, funding issues, or service interruptions.

Delays or errors in the processing, delivery, or distribution of mail and packages, resulting in operational inefficiencies or customer service concerns.

Inaccurate tracking, reporting, or record keeping related to mail room operations, resulting in compliance or accountability issues.

The incumbent must exercise care and diligence to ensure the integrity, efficiency, and effectiveness of mailroom operations and to support the overall mission of the Logistics Operations Branch.

PUBLIC AND INTERNAL CONTACTS

Internal Contacts:

District staff at all levels, including analysts, supervisors, managers, and mail room personnel, to provide guidance and support on mail room operations, service coordination, administrative procedures, and delivery issues.

Logistics Operations Branch staff to support program operations and ensure compliance with departmental policies and procedures.

Accounting, Procurement, and other administrative staff regarding invoice processing, encumbrance tracking, Cal-Card reconciliation, and vendor payments.

Program staff and office contacts throughout the District regarding incoming and outgoing mail, package distribution, special delivery requests, and related service needs.

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External Contacts:

Vendors and service providers regarding contract documentation, invoicing, payment processing, shipping activity, and service-related inquiries.

USPS, GLS, and other courier or delivery representatives regarding mail service operations, billing issues, and service coordination.

Members of the public or external agencies when responding to mail delivery, package receipt, or service-related inquiries, as appropriate.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical Requirements:

Ability to sit for extended periods while working at a computer or attending meetings.

Ability to walk, stand, bend, reach, and move throughout mail room and office areas as needed.

Occasional lifting, carrying, or moving of mail trays, packages, boxes, and supplies weighing up to 25 pounds.

Manual dexterity to operate standard office and mailroom equipment such as computers, printers, scanners, telephones, postage equipment, and shipping tools.

Mental Requirements:

Ability to analyze and interpret data, invoices, policies, procedures, and operational information.

Capacity to manage multiple tasks and shifting priorities under tight deadlines.

Ability to maintain focus and attention to detail while performing repetitive, time-sensitive, or data-intensive tasks.

Ability to review and reconcile records accurately and apply sound judgment in resolving routine operational or administrative issues.

Emotional Requirements:

Ability to work independently and collaboratively in a team environment.

Maintain professionalism and composure when dealing with time-sensitive deliveries, operational issues, billing discrepancies, or customer service concerns.

Adaptability to changing priorities and the ability to respond constructively to feedback or unexpected challenges.

Maintain a positive and respectful attitude in interactions with coworkers, management, vendors, service providers, and internal customers.

WORK ENVIRONMENT

The incumbent primarily works in a standard office and mail room environment with artificial lighting and controlled temperature. The position involves prolonged periods of sitting and working at a computer workstation, as well as regular movement within mail room operations areas. The work requires frequent use of office and mailroom equipment such as computers, printers, scanners, telephones, postage equipment, and shipping or mailing tools.

Occasional physical activity may be required, such as:

Receiving, sorting, or distributing mail and packages.

Retrieving, storing, or moving mail trays, packages, records, or supplies in mail room or storage areas.

Lifting and moving boxes, packages, or mail-related materials weighing up to 25 pounds.

The position may also involve:

The position may also involve: Occasional travel within the District for meetings, training, or operational support needs.

Participation in virtual meetings and use of collaboration tools.

A fast-paced work environment that may involve frequent interruptions, shifting priorities, service deadlines, and time-sensitive mail or delivery issues requiring flexibility and adaptability.

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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
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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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