

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION North Region Consultant Services Unit	
WORKING TITLE Consultant Services Analyst	POSITION NUMBER 903-200-5393-XXX	REVISION DATE

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, the Consultant Services Analyst performs analytical, technical, and compliance-related work to support the development, administration, and oversight of Architectural and Engineering (A&E) consultant contracts, service contracts, cooperative agreements, and financial tracking tools within the North Region. The incumbent independently conducts complex analytical tasks to ensure contract integrity, fiscal compliance, policy alignment, and timely project delivery while coordinating with internal and external stakeholders.

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. (Employee Excellence - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - 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. (Employee Excellence - Integrity)
- **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, Stewardship)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Employee Excellence - Collaboration)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - People First)
- **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, People First, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration, Integrity, 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 - Stewardship)

TYPICAL DUTIES:

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

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35%	E	The analyst is responsible for managing contracts, task orders, processing invoices and ensuring adherence with State laws and regulations. The position reviews and evaluates contract documents, cost proposals, personnel requests, and overhead or profit structures to verify compliance with State and Federal laws. The analyst conducts labor compliance reviews subcontractor verification, and adjudication of violations. The incumbent confirms minimum qualifications, negotiated labor rates, and consultant resource availability, and works closely with the Contract Manager and Task Order Manager to identify, address, or elevate contract issues or disputes. The role requires ongoing communication with internal and external stakeholders to ensure smooth contract execution and timely resolution of contract related matters.
30%	E	The analyst prepares and reviews monthly expenditure reports, analyzes spending patterns, and reconciles contract expenditures to ensure they align with budget authority and allocations. The position is responsible for setting up and modifying task orders in CGI, encumbering and disencumbering funds, and adjusting funding across projects and fiscal years as needed. The analyst tracks expenditures and prepares financial reports for management and project teams. In addition, the position maintains data accuracy within statewide and regional financial tracking systems, helping support informed decision-making and ensuring compliance with departmental fiscal requirements.
20%	E	The analyst participates in workload allocation reviews and works closely with divisions, project managers, and office chiefs to assess and coordinate funding needs. The position collaborates with Headquarters, regional staff, and external partners to ensure scopes of work and level-of-effort estimates are accurate and reflective of project requirements. The analyst also assists with planning and organizing Capital Outlay Support (COS) work activities to support project delivery throughout the North Region. This role requires strong coordination and communication skills to ensure that planning activities remain aligned with regional priorities and deadlines. May be responsible for preparing new contracts, contract renewals or amendment documents. May be responsible for coordinating and attending public events. May act as a liaison or representative of the Calmentor North Region Program.
10%	E	The analyst maintains CSU document management systems and tracking tools to ensure timely and accurate documentation. The position ensures files, spreadsheets, and supporting materials are organized, updated, and compliant with departmental standards. The analyst manages updates to regional tracking systems and coordinates with staff to maintain the accuracy and completeness of contract-related documentation, supporting transparency and ease of access for CSU and project teams.
5%	M	Other miscellaneous duties and assignments within the position and classification specifications.

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 incumbent must have general knowledge of the accounting, budgeting, and contract procurement and management processes. Must be able to analyze and interpret policies, agreements, and contracts; develop and implement new and revised procedures; maintain accurate records; and take action independently. Must also have the ability to work closely and effectively with others and be able to communicate effectively, both orally and in writing. The incumbent must possess excellent written and verbal skills to effectively communicate technical information in reports, correspondence and meetings. Incumbent must possess the ability to work independently, effectively, and efficiently to coordinate multiple assignments and tasks. Incumbent must possess the ability to work under pressure. Must be able to analyze, reason logically, recognize problems and develop solutions, and make recommendations for improvement and simplification. The work of the incumbent is detailed, complex, and variable and requires independent action and decision making.

The incumbent must have the ability to work closely with Project Managers, Functional Managers, and Headquarters units to establish a clear scope of work description/statement, which forms the basis for estimating, scheduling, cost control and general consultant and project coordination. The incumbent must have the ability to evaluate and make recommendations concerning the appropriateness of contracting consultant services for various Capital Outlay Support (COS) work efforts.

The incumbent must have the ability to represent Caltran's interest when coordinating with consultants, and understand/evaluate both the performance of consultants and the product they produce.

POSITION DUTY STATEMENT

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The inappropriate use or over-expenditure of allocated resources could establish an illegal obligation and/or expenditure of funds. Failure to properly interpret and ensure compliance with current contract procurement procedures could result in costly disputes with consultants and local agencies, legal actions, and delays in providing the public with timely highway improvements.

PUBLIC AND INTERNAL CONTACTS

Interacts with Headquarters and Regional management staff and internal technical staff, other State, Federal and local agencies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone.

Incumbent must be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Employee must have the ability to multi-task, to adapt to changes in priorities, and complete tasks or projects with short notice.

Incumbent must; be able to value cultural diversity and other individual differences in the workforce; adjust rapidly to new situations warranting attention and resolution; consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations; be tactful and treat others with respect.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting using a personal computer. Employee may be required to travel for training or meetings. Regular and punctual attendance is required.

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

CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION North Region Consultant Services Unit	
WORKING TITLE Consultant Services Analyst	POSITION NUMBER 903-200-5157-XXX	REVISION DATE

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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.

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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