

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION D10 Construction	
WORKING TITLE Field Office Associate	POSITION NUMBER 910-501-5393-XXXX	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the direction of the Area Construction Engineer, Senior Transportation Engineer (Civil), the incumbent reviews and analyzes the status of projects in the office of construction, gathers information and responds to inquiries regarding projects, tracking account usage and analyzing data for construction project expenditures. Performs analysis, calculations, prepares contracts, monthly progress payment estimates for all the contracts assigned to the field office, analyzes actual usage reports and maintains related logs. Reviews data / information and makes modifications, submittals, updates on-line programs, and supports project tasks and responsibilities as assigned by the Area Construction Engineer.

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. (Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **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. (Strengthen Stewardship and Drive Efficiency - 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. (Cultivate Excellence - Engagement, Innovation)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)

TYPICAL DUTIES:

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

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50%	E	Analyzes quantity calculations and prepares the monthly progress estimate. Maintain, audit and review necessary records pertaining to construction progress, job expenditures, contract change orders, lane closure charts, labor compliance interview, utility service requests, weekly statement of working days, progress pay estimates, after acceptance estimates, proposed final estimates, semi-final estimates and final estimates and contingency balance. Manage contract records in Falcon and inputs, review and audit document meta data as necessary. Ensures timely payment of invoices, maintains related files and documentation. Analyzes and audits daily reports submitted by Assistant Resident Engineers and other field personnel verifying that the work is recorded and / or equipment listed and/or contractor staff listed are identified accurately, and analyzes daily reports to prepare and issue the Weekly Statement of Working days as required. Drafts routine change orders as directed by the Area Construction Engineer.
35%	E	Consultant Tracking and Task Order Management - Performs comprehensive consultant tracking and task order support to ensure accurate allocation of consultant hours and effective project delivery. Responsibilities include monitoring consultant hours by project, analyzing task order funding and expenditures using departmental databases (e.g., PRSM), and maintaining a detailed weekly tracking log based on timesheets collected from Construction Seniors. Reviews and reconciles monthly consultant invoices against internal records to ensure accurate billing and assists Task Order Managers with necessary corrections or adjustments. Communicates regularly with Consultants, Construction Seniors, Resident Engineers, Project Managers, and Task Order Managers to coordinate hour modifications, request approvals, and facilitate movement of hours between projects for efficiency. Participates in meetings with consultants and task order management staff, recording notes and identifying follow up actions to support workflow continuity. Provides proactive updates to management when consultant hours are approaching limits to prevent project delays and ensure proper task order compliance.
10%	E	Analyzes and reviews contract item payment calculations for accuracy and initiate computer input for payment. Analyzes, monitor and audit payments to the contractor and project expenditures for State Furnished Materials and ensure that budgetary financial allotments are not exceeded. Analyzes and maintains status of upcoming and ongoing construction contracts. Investigates and responds to construction project related inquiries.
5%	M	Determines necessary needs and repairs to the construction office. Reviews contract documents, scans documents, makes copies, and maintains office and field equipment, including filling paper, toner, and doing some basic trouble shooting. Reviews and processes contract administration documents; performs calculations, sorting, filing, photocopying, and other related duties. Prepares reports for field office supplies and equipment.

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

No formal supervision will be performed. However, this position will act as lead in providing contract work records, budget and maintaining contract documentation and may have responsibility for functional guidance in training and assisting less experienced employees.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have a thorough knowledge of the Department's organization and its functional units in order to perform their duties and work under pressure to meet planned and contract deadlines. Must have knowledge of Departmental policies and procedures including, but not limited to, the Construction Manual, Standard Specifications, and Special Provisions. The incumbent must have the ability to analyze situations accurately, and take appropriate and effective action; deal tactfully with internal stakeholders, contractors, and outside consultants on a sensitive and timely manner. The incumbent must have the working knowledge of common office personal computer software, such as Windows, Word, Excel, Power Point, Adobe Acrobat, etc. Additionally, must be familiar with modern office methods, supplies, and equipment. Incumbent must possess excellent organization skills in order to meet deadlines to ensure timely project delivery and must possess the ability to communicate effectively both orally and in writing.

ADA Notice

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must be able to effectively make decisions concerning work in progress and in solving assignment related issues. Failure to perform work in an accurate, organized, and timely manner could result in unnecessary delays and/or costs to the Department. The incumbent must be able to set priorities with the work schedule, as poor judgement would hamper work flow resulting in loss of time, work delays, and substandard service by the Department.

PUBLIC AND INTERNAL CONTACTS

This position requires continuous written and oral communication with the supervisor, within the unit, resident engineers, other internal and external partners. Incumbent must establish and maintain courteous and cooperative relationships with those contacted in the course of work; and provide high quality of service. Must adhere to service standards set by incumbent's unit and provide high quality of service to both internal and external customers.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Repetitive usage of extremities is required. Some lifting, carrying, bending, squatting, kneeling, crouching, reaching, and pulling may be required but it will not be frequent. Must be able to transport a variety of objects weighing up to twenty pounds. Ability to work indoors under artificial light. May be required to sit for long periods of time using a keyboard and video display terminal. The incumbent may be exposed to construction dust, dirt, noise, and inclement weather.

Must be able to perform multiple tasks by prioritizing work load based upon importance and urgency. Must be able to remain organized and adapt to changing priorities and complete assigned tasks or projects with short notice. Must be able to develop and maintain cooperative working relationships; consider the needs and perspectives of others; respond effectively to changing circumstances and communicate to foster a team-oriented environment.

WORK ENVIRONMENT

While at the construction office employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Overtime and/or flextime may be required. Vacations may be restricted during peak times.

Job may have exposure to chemicals, lab conditions, equipment, heavy machinery, heat, cold, dust, gas, fumes, outdoor conditions, indoor conditions, humidity, and high decibels of noise.

Travel may be required and the selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursement calculations considers an employee's designated Headquarters location, primary residence, and may be subject to Cal HR or applicable bargaining unit contract provisions.

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

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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.)

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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