

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Equipment Materiel Specialist	OFFICE/BRANCH/SECTION Division Of Equipment - Materiel Services/Purchasing 3251	
WORKING TITLE Materiel Acquisition Specialist	POSITION NUMBER 932-001-1552-925	REVISION DATE 07/16/2026

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 Equipment Materiel Coordinator (EMC), in Headquarters Materiel Services / Purchasing Branch, the Equipment Materiel Specialist (EMS) receives supervision from the Equipment Materiel Coordinator (EMC), and day-to-day direction from the Equipment Materiel Manager II and Senior Equipment Materiel Specialist. Performs Equipment Materiel Operations work concerning the purchasing, inventory, disbursement, shipping and receiving of equipment parts, materials, related equipment and services for the fabrication, maintenance, repair and disposal of mobile equipment. Analyzes Stock Order reports and processes stock orders for Division of Equipment warehouses. The incumbent plans, organizes, directs, and conducts procurement activities under the Division of Equipment (DOE) Purchasing Authority Delegation. In the course of performing their daily duties, the incumbent uses various computer software systems including; Microsoft Suite, Adobe, E-FIS, eProcurement, SCPRS, and Fleet Anywhere. Incumbent must possess a valid class C driver's license.

CORE COMPETENCIES:

As an Equipment Materiel Specialist, 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. (Safety, Employee Excellence - Collaboration, Stewardship)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Employee Excellence - Collaboration, Stewardship)
- **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. (Safety, Employee Excellence - Collaboration, 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, Integrity, Stewardship)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Equity, Employee Excellence - Equity, Integrity, Pride, Stewardship)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Employee Excellence - Collaboration, Integrity, 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. (Employee Excellence - 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 - Integrity, Stewardship)
- **Business Acumen**: Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Safety - Collaboration, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	Creates stock order parts replenishment reports for DOE shops statewide and analyzes these reports to determine which orders should be placed or canceled based on established criteria. Generates order forms that include vendor information, billing and shipping details, quantities, descriptions, manufacturer data, part numbers, and pricing. Produces purchase order logs documenting all orders generated for each DOE shop. Communicates with DOE personnel statewide regarding stock order activity and provides updates as needed. Processes stock orders in AssetWorks to create corresponding PO records for each shop. Generates PO documents using the Forms Interface Program (FIP) and Advantage, and distributes stock orders and supporting documentation to DOE parts departments statewide. Maintains regular communication with DOE shop personnel to ensure clarity and accuracy throughout the stock order process.
30%	E	Responsible for procuring non-IT goods for DOE shops in accordance with the Materiel Services Procedures Handbook (MSH), DPAC Acquisitions Manual, and State Contracting Manual (SCM). Determines the appropriate cost coding and procurement method for each purchase. Executes procurements within the DOE Purchasing Purchase Authority Delegation and prepares purchase documents such as Purchase Orders (POs) and Cal-Card transactions. Sources non-IT goods and services using Statewide Contracts, the California Multiple Award Schedule (CMAS), State Price Schedules, California Correctional Training and Rehabilitation Authority (CALCTRA) agreements, Master Agreements, and competitive procurement methods. Conducts end-to-end procurement activities including market research, vendor identification, solicitation of bids or quotes, bid evaluation, document creation, inspection and acceptance, payment processing, and maintenance of procurement records. Supports DOE efforts to meet statewide participation goals of 25% spending with Certified Small Business Enterprises and 3% with Disabled Veteran Business Enterprises.
20%	E	Maintains an active CAL-Card account and uses the CAL-Card to purchase goods and services for the DOE Headquarters programs. Conducts solicitations for goods and services to be acquired with the CAL-Card. Contracts for services using CAL-Card Service Agreements for service purchases under \$20,000. Generates CAL-Card Purchase Orders (CPOs) in FIP and Advantage. Ensures vendors process CAL-Card charges promptly to prevent late fees and avoid negative impacts on the cardholder's account. Performs monthly reconciliation of all CAL-Card transactions against Advantage records and the bank statement, and submits the monthly Statement of Account to the Division of Accounting (DofA) within required timelines. Ensures all payments are made in compliance with the Prompt Payment Act. Maintains detailed records of all transactions and monthly statements in accordance with the DPAC Acquisitions Manual and DOE Records Retention Schedule.
5%	M	Assists with parts data maintenance in AssetWorks. Analyze parts data such as part descriptions, inventory levels, cross references, units of measure, etc. Makes recommendations for changes to parts data to ensure accuracy and relevance of the part data in AssetWorks. Keying changes to parts information in AssetWorks parts records. Communicates with purchasing staff, Data Management Branch, and shops regarding recommendations and changes.
5%	M	Performs market research to identify sources for goods and services needed by DOE. Searches for Small Business and Disabled Veteran Business Enterprises to solicit bids/quotes from to help ensure DOE meets it's goal to spend goals of spending 25% with Certified Small Business Enterprises and 3% with Disabled Veteran Enterprises.

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
Knowledge of principles and techniques of state procurement, purpose and functions of the various components of the DOE Purchasing Program; CAL-Card program, purchasing best practices and methods. Must have working knowledge of: Electronic data processing systems, Microsoft Office programs, AW, Advantage, Forms Interface Program (FIP), AMP program, and other IT systems and programs.
Thorough knowledge of automotive and construction equipment parts, components, and supplies. Ability to analyze data, make recommendations. Thorough knowledge of laws, regulations, policies and practices of all purchasing functions. Capability of handling complex purchasing problems. Good working knowledge of information technology systems and processes used in DOE and purchasing for the state.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

Ability to plan, organize, conduct, and evaluate situations accurately and adopt an effective course of action; communicate effectively both orally and in writing; present complex ideas and information in narrative format using Microsoft Office applications including Microsoft Word, Excel, and Outlook.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is expected to make sound decisions and take appropriate actions to reach Caltrans' objectives. The consequence of errors in program direction and execution can result in: loss of resources, negative customer relations, increased costs for equipment deployment, excessive equipment downtime, waste of resources, and increase the possibility of culpable negligence resulting in the loss of the State's assets.

This position has been designated as safety sensitive in accordance with Department of Personnel Administration Rules 599.960 and 599.961. Use of alcohol and/or drugs that impede the employee's ability to perform his or her duties safely and effectively could clearly endanger the health and safety of others, resulting in injury and or death.

PUBLIC AND INTERNAL CONTACTS

Employee works directly with DOE employees at all levels, and managers from other agencies and programs. Receives procedural requests from Division employees at all levels and managers from other programs.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent; may be required to sit for prolonged periods of time; be willing to travel on occasion; have the ability to develop and maintain cooperative working relationships; be able to respond appropriately to difficult situations.

Must be a team player and able to develop and maintain cooperative relationships. Incumbent must behave in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service.

Incumbent should possess ability to resolve emotionally charged issues, and possess tact, maturity, diplomacy and keenness of observation when analyzing situations and making recommendations.

Incumbent will be required to use a keyboard and video display terminal.

Incumbent must be able to travel throughout the State to Caltrans Shops.

Ability to stand and walk on concrete flooring for prolonged periods, frequently stooping, bending and kneeling; sit for prolonged periods of time; lift and move equipment parts and boxes weighing up to 50 pounds frequently, and up to 75 pounds occasionally; reach overhead to retrieve or place objects weighing up to 35 pounds; climb stairs carrying objects weighing up to 50 pounds on occasionally; operate forklifts and hand operated material-handling devices.

Possession of a class "C" drivers license and be able to travel to distant locations in inclement weather.

Will be required to wear safety equipment including eye protection (safety glasses), ear plugs, safety vest, and hard hat. Must be able to wear protective clothing as required and furnished by the Division of Equipment.

WORK ENVIRONMENT

Employees will work in a climate-controlled office under artificial lighting, as well as travel to field locations at varying times of the day or night and in inclement weather as required.

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
----------------------	------

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

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
------------------------	------