

State of California
DUTY STATEMENT



California Department of
State Hospitals

SH3002 (Rev. 02/2020)

RPA Control No.#	C&P Analyst Approval FA	Date 8.17.2026
------------------	----------------------------	-------------------

Employee Name		Division Department of State Hospitals-Metropolitan		
Position No / Agency-Unit-Class-Serial 487-540-5157-		Unit General Services / Procurement		
Class Title Analyst I		Location Administration- General Services Office		
SUBJECT TO CONFLICT OF INTEREST ☐ Yes ☒ No		CBID R01	WORK WEEK GROUP 2	PAY DIFFERENTIAL
				OTHER

BRIEFLY (1 or 2 Sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Supervisor II/Supervisor I and designee, the incumbent, will perform various consultative and analytical staff services assignments. Performing a wide variety of difficult, complex technical, and analytical business service activities of a routine nature in various functions and is expected to consistently exercise a high degree of initiative, independence, and originality in performing assigned tasks.

% OF TIME PERFORMING DUTIES	INDICATE THE DUTIES AND RESPONSIBILITIES ASSIGNED TO THE POSITION AND THE PERCENTAGE OF TIME SPENT ON EACH. GROUP RELATED TASKS UNDER THE SAME PERCENTAGE WITH THE HIGHEST PERCENTAGE FIRST; PERCENTAGE MUST TOTAL 100%. (Use additional sheet if necessary.)
-----------------------------------	--

ESSENTIAL FUNCTIONS

30%

Contract consultation, Planning, Development, Analysis and Evaluation:

Provide consultation, review, and preparation of hospital service agreements on contract documentation including, but not limited to, Invitation for Bids, Request for Quotes, Amendments, Service Orders, Scopes of Work development, license requirements/validations, insurance certifications, and Certified Small Business, Microbusiness, and Disabled Veteran Business Enterprise Participation Goals. Ensuring documentation for adherence to policies, procedures, and regulations, as well as for accuracy and completeness. All contract documents must adhere to state requirements as per the State Administrative Manual, Department of General Services (DGS) State Contracting Manuals, Office of Legal Services, and the Department of State Hospitals (DSH) policies and procedures. Develop and advertise services on the state's website. Prepare and forward contract documentation to administration, department managers or designees to monitor contractor performance, contractor compliance, invoicing, and all other requirements as necessary throughout the contract period. Evaluate and determine validity of all bidding and supporting documentation submitted by contractors. Ensure that all required contract approvals are obtained from DSH-Metropolitan, DSH-Sacramento, DGS, and any other control agency as required.

30%

Coordinate Procurement of Goods and Equipment:

Ensure the proper execution of purchase orders into the state's financial system. Research and interpret procurement methods, assist administration, departments, and requestors with the planning process to purchase goods and equipment meeting all state and federal requirements, along with DGS and DSH policies and procedures. Receive requests, prepare solicitations, review requests/solicitations from requestors, including analyzing data, calculations, and supplier documents for adherence to all mandated purchasing policies and procedures. Research statewide contract specifications such as Leverage Procurement Agreements, Small Business/Microbusiness/Disabled Veteran Business Enterprise certifications, verify California Dept. of Tax and Fee Administration for seller's permits and applicable sales tax regulations, and Federal and State Tax Delinquency sites to adapt and apply to procurement orders/activities. Analyze, upload and process vendor Payee Data Records through the FI\$Cal Vendor Management function. Provide consultation and recommendations to

	department managers, designees, and requestors regarding actual and potential procurement related problems, advising appropriate action for problem resolution based on the State Contracting Manuals and other governing agency requirements. Generate and amend purchase orders, purchase estimates, one-time acquisitions, Limit to Brand and Non-Competitive Bid requests to procure goods. Consult with DGS Transportation Management for freight requirements as necessary. Provide assistance to DSH-Metropolitan programs in analyzing issues with invoice discrepancies with the goods purchased. Ensure all procurement packets/purchase orders contain all required documents and are kept on file as required by DGS and DSH policy. Complete audit of all purchasing files for each fiscal year; Complete tracking logs for files that are stored in archive for easy access; Provide excellent customer service to all requestors, vendors, and other hospital personnel in person, via email and over telephone; Responsible for daily monitoring of the DSH procurement & service emails, scanning of incoming documentation, keeping electronic and paper files in organized manner, Provide training for other departmental requestors as needed;
30 %	Acts as the hospitals Asset Management Maintainer for the Financial Information System for California (FI\$Cal) program, in accordance with the State Administrative Manual (SAM) and the Department of State Hospital (DSH) Property Control Manual (PCM). Works with the DSH — Sacramento Fleet and Asset Management Section (FAMS) in order to complete reporting requests. Gathers and analyzes data from annual inventories, reconciles any discrepancies. Completes the Major Equipment Reconciliation Report involved in capitalized assets that are procured or surveyed throughout the month. Reviews annual budget allocations of all Capitalized and Non-Capitalized assets based on hospital usage and needs. Reviews data with the Supervisor II, Supervisor I, and the Property Controller to maintain accurate property inventories and presents information in a report to the Supervisor II/I. <u>MARGINAL FUNCTIONS</u>
5 %	Process patient benefit fund (PBF) orders. Dispatch a STD.65 — Purchasing Authority Purchase Order Form to utilize special funding for patient specific purchases.
5 %	Completes monthly procurement credit card reconciliation for hospital procurement card users. All other duties and special projects as assigned consistent with this classification.

SUPERVISION RECEIVED

Under the direction of the Supervisor II/Supervisor I or designee.

SUPERVISION EXERCISED

N/A

KNOWLEDGE AND ABILITIES

Knowledge of: Principles, practices, and trends of public and business administration, management and supportive staff services such as budgeting, personnel, and management analysis; and government functions and organization; methods and techniques of effective conference leadership. Arithmetic, spelling, grammar, punctuation, and modern English usage.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the regular course of work. Independently interpret and use reference material; give and follow direction; design and prepare tables, spreadsheets, and charts; operate a computer keyboard/terminal; organize and prioritize work; create/draft correspondence; act as a team or conference leader and appear before management and other committees.

SPECIAL REQUIREMENT

Ability to: Prioritize workload, to work with a variety of audiences and communication styles, meet deadlines, develop, and maintain complex spreadsheets. Adapt to changes in policies and regulations.

REQUIRED COMPETENCIES**PHYSICAL**

The incumbent must possess the necessary physical, mental, and cognitive abilities to perform the highly specialized work needed to carry out the essential duties of the position. This includes but is not limited to working with computer software and hardware, bending, stooping, twisting, walking on irregular surfaces, pushing and pulling up to 25 pounds, lifting and carrying up to 25 pounds, and repetitive fine motor and hand motion.

SAFETY

Actively supports a safe and hazard free workplace through practice of personal safety and vigilance in the identification of safety or security hazards, including infection control.

CULTURAL AWARENESS

Demonstrates awareness to multicultural issues in the workplace, which enables the employee to work effectively.

CPR

Maintains current certification

SITE SPECIFIC COMPETENCIES

- Develop plans, specifications, invitations to bids, and budget proposals.
- Utilize the State administrative process relating to contract and procurement administration.
- Analyze situations and problems accurately in order to take effective course of action.

TECHNICAL PROFICIENCY (SITE SPECIFIC)

- Demonstrated ability to interpret Public Contract Law and California Code of Regulations

as it refers to Contract preparation.

- Demonstrated ability to act independently, open-mindedness, flexibility, and tact.
- Demonstrated competencies to develop plans, specifications, invitations to bids, budget change proposals.
- Demonstrated ability to provide computer generated reports, memoranda, graphs, etc.
- Use of technology, including but not limited to Microsoft Office, Microsoft Teams, WebEx, Zoom, and other virtual platforms as required.

LICENSE OR CERTIFICATION - not applicable

TRAINING - Training Category = Type II General

The employee is required to keep current with the completion of all required training.

THERAPEUTIC STRATEGIC INTERVENTION (TSI)

Supports safe working environment; practices the strategies and intervention that promote a therapeutic milieu; applies and demonstrates knowledge of correct methods in the management of assaultive behavior. Training provided during new employee orientation.

PRIVACY AND SECURITY OF PROTECTED HEALTH INFORMATION

Maintains and safeguards the privacy and security of patients' protected health information (PIH) and other individually identifiable health information (IIHI) whether it is in paper, electronic, or verbal form in compliance with HIPAA and all other applicable privacy laws.

INFECTION CONTROL

Applies knowledge of correct methods for controlling the spread of pathogens appropriate to job class and assignment.

WORKING CONDITIONS

The working conditions vary from routine to intense. An employee working in this capacity is Required to make unpopular decisions. The employee must be able to always maintain a professional demeanor and perform their work systematically and consistently, keeping within legal boundaries to prevent undue protests from contractors.

The employee is required to work any shift and schedule in a variety of settings throughout the hospital and may be required to work overtime and float to other work locations as determined by operational needs of the hospital. All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicate the presence of infection and are able to safely perform their essential job functions.

EMPLOYEE IS REQUIRED TO:

- Report to work on time and follow procedures for reporting absences;
- Maintain a professional appearance;
- Appropriately maintain cooperative, professional, and effective interactions with employees, patients/clients, and the public.
- Comply with hospital policies and procedures.

All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and can safely perform their essential job functions.

Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain

confidentiality at all times.

The Department of State Hospitals provides support services to facilities operated within the Department. A required function of this position is to consistently provide exceptional customer service to internal and external customers.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights).

Employee's Signature

Date

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

Supervisor's Signature

Date

State of California
DUTY STATEMENT



California Department of
State Hospitals

SH3002 (Rev. 02/2020)

RPA Control No.#		C&P Analyst Approval FA		Date 8.17.2026
Employee Name		Division Department of State Hospitals-Metropolitan		
Position No / Agency-Unit-Class-Serial 487-540-5393-		Unit General Services / Procurement		
Class Title Analyst II		Location General Services – Procurement Office		
SUBJECT TO CONFLICT OF INTEREST ☐ Yes ☒ No	CBID R01	WORK WEEK GROUP 2	PAY DIFFERENTIAL	OTHER

The Department of State Hospital's mission is to provide evaluation and treatment in a safe and responsible manner, and seek innovation and excellence in hospital operations, across a continuum of care and settings. You are a valued member of the Department's team. You are expected to work cooperatively with team members and others to enable the department to meet these goals and provide the highest level of service possible. Your efforts to treat others fairly with dignity and respect are important to everyone with whom you work.

MAJOR TASKS, DUTIES, and RESPONSIBILITIES: Under the direction of the Supervisor II/Supervisor I or designee, the Analyst II is responsible for a variety of activities and complex technical analytical staff services work in the Contract Program. Duties include consultative and analytical services to management and others, coordination of the planning, development, and final drafting of all contracted services. Incumbent must exercise the ability to act independently, remain flexible, and reason logically, creatively and utilize a variety of analytical techniques to resolve the more complex problems.

% OF TIME PERFORMING DUTIES	INDICATE THE DUTIES AND RESPONSIBILITIES ASSIGNED TO THE POSITION AND THE PERCENTAGE OF TIME SPENT ON EACH. GROUP RELATED TASKS UNDER THE SAME PERCENTAGE WITH THE HIGHEST PERCENTAGE FIRST; PERCENTAGE MUST TOTAL 100%. (Use additional sheet if necessary.)
30%	<u>ESSENTIAL FUNCTIONS</u> <u>Contract Preparation :</u> • Prepares bid packages for Hospital execution and DGS review. Ensure that contracts are submitted to departments/agencies for approval in accordance with State contracting laws, regulations, policies, and procedures. • Prepares and develops technical documents (e.g., contracts, service agreements, regulations, policies and procedures, etc.) to meet program needs, utilizing available resources (e.g. Purchasing Authority Manual, State Contracting Manual, the Public Contract code, Welfare and Institutions Code, California Code of Regulations, Government Code, electronic legislature data sources, etc.) at the direction of management. • Write service and consultant project work advertising; establish timeframes for all projects; develop invitation for bids; interpret rules, regulations, and requirements for prospective bidding contractors; review, evaluate, award bids, and coordinate agency/contractor contacts. • Conducts bid openings and provides answers to a wide range of contract questions in an accurate and timely manner from headquarters and/or hospital staff and the public. • Research and analyzes compliance with contract terms and prepares recommendations relative to acceptance of contract documents and award.

- Directs contract approvals, ensuring that contracts are submitted to control departments/agencies, such as DGS, for approval in accordance with State contracting law regulations, policies and procedures.

Consultative Contract Administration:

30%

- Consult with hospital management and recommends the appropriate action to follow in solving complex contracting issues. Make recommendations on a broad spectrum of administrative and program-related contracting problems and develop a plan of action.
- Conduct research and analyze technical contractual issues for preparation of thorough written reports of findings for required corrective action to legal actions.
- Consult with management and other hospital staff on contracting issues including making recommendation to meet the needs of the Hospital and developing new contract language.
- Interprets and clarifies contract terms to contractors, DSH Headquarters, Hospital Management, other State agencies and union locals.
- Provides consultative and analytical services to management and other technical staff related to the execution of service contracts. Act as liaison with outside agencies, i.e., Department of General Services, DSH Headquarters, other State Hospitals, and Contractors, to ensure compliance with state contracting laws.
- Liaisons with Accounting staff in providing contractual documentation, ensuring prompt payment, and assisting with billing issues that may arise.
- Coordinates the annual development, writing, and submission of Unallocated Fund Requests (UFR) to DSH Hospital Operations for review and approval. Develops, implements, and monitors multi-year budget plans.
- Gathers, analyzes and summarizes data for ongoing service needs in the preparation of proposed project budget allocation funding, change orders, addendums, and other special assignments.

20%

Asset Management & Inventory Control:

Acts as the hospitals Asset Management Maintainer for the Financial Information System for California (FI\$Cal) program, in accordance with the State Administrative Manual (SAM) and the Department of State Hospital (DSH) Property Control Manual (PCM). Works with the DSH — Sacramento Fleet and Asset Management Section (FAMS) in order to complete reporting requests. Gathers and analyzes data from annual inventories, reconciles any discrepancies. Completes the Major Equipment Reconciliation Report involved in capitalized assets that are procured or surveyed throughout the month. Reviews the annual budget allocations for all capitalized and non-capitalized assets based on hospital usage and needs, which includes inventory control measures. Reviews data with the Supervisor II, Supervisor I, and the Property Controller to maintain accurate property inventories and presents information in a report to the Supervisor II/I.

Analytical Reporting:

15%

- Gathers data and consults with various Managers to prepare renewals and/or participate in various reporting requests.
- Gathers data and consults with the Procurement Manager(s) for information to include in the Governing Body Report for review and submittal of the Acquisitions & Business Services section.
- Works with Accounting department to ensure proper, object code expenditures.
- Coordinate allocation budget funding codes and invoices with accounting

5%	• Acts in an independent manner to organize, prioritize, and develop new procurement procedure improvement while continuing to manage workload and meet deadlines. • Maintains procurement tracking systems and listings <u>MARGINAL FUNCTIONS</u> All other duties and special projects as assigned consistent with this classification. Serves as a backup and support for the Analyst II(s) responsible for Public Works. May serve as peer review or assist with execution of various special repair or maintenance agreements as current workload requires.
Other Information	SUPERVISION RECEIVED Under the direction of the Supervisor II/Supervisor I or designee. SUPERVISION EXERCISED N/A <u>KNOWLEDGE AND ABILITIES</u> KNOWLEDGE OF: Principles, practices, rules, regulations, and codes relating to public works, business management, trends, capital outlay process, government functions and organizations, such as budgeting, personnel, and management analysis, methods and techniques of effective conference leadership. ABILITY TO: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the regular course of work. Independently interpret and use reference material; give and follow direction; design and prepare tables, spreadsheets, and charts; operate a computer keyboard/terminal; organize and prioritize work; create/draft correspondence; act as a team or conference leader and appear before management and other committees. <u>REQUIRED COMPETENCIES</u> PHYSICAL The incumbent must possess the necessary physical, mental and cognitive abilities to perform the highly specialized analytical work needed to carry out the essential duties of the position. This includes, but is not limited to working with computer software and hardware, bending, stooping, twisting, walking on irregular surfaces, pushing and pulling

up to 25 pounds, lifting and carrying up to 25 pounds, and repetitive fine motor and hand motion.

SAFETY

Actively supports a safe and hazard free workplace through practice of personal safety and vigilance in the identification of safety or security hazards, including infection control.

CULTURAL AWARENESS

Demonstrates awareness to multicultural issues in the workplace, which enables the employee to work effectively.

CPR

Maintains current certification.

SITE SPECIFIC COMPETENCIES

- Develop Budget Proposals, Request for Quotes, Invitation to Bid, and licensing plan of corrections.
- Evaluates and reviews bids for accuracy, responsiveness and processing.
- Utilize the State Administrative Process relating to procurement, real estate and contract administration.
- The ability to use the internet for research, data gathering, and advertising, as required by the Office of Small Business Certification and Resource.
- Analyze situations and problems accurately in order to take effective course of action.
- Demonstrated ability to interpret Public Contract Law and California Code of Regulations as it refers to Contract preparation.
- Demonstrated ability to act independently, open-mindedness, flexibility, and tact.
- Demonstrated competencies to develop plans, specifications, invitations to bids, budget change proposals.
- Demonstrated ability to provide computer generated reports, memoranda, graphs, etc.
- Demonstrated ability to draft, edit, write, and rewrite correspondences.
- Utilize Fi\$Cal and submit IFB's and RFQ's to the Contracts Register.

TECHNICAL PROFICIENCY (SITE SPECIFIC)

- Applies and demonstrates knowledge of: Microsoft Windows such as Microsoft Word, Outlook, Access, Excel, and Power Point.
- Applies and demonstrates knowledge of: Adobe Acrobat (Adobe Acrobat) for PDF features.
- Use of technology, including but not limited to Microsoft Office, Microsoft Teams, WebEx, Zoom, and other virtual platforms as required.

LICENSE OR CERTIFICATION - not applicable

TRAINING - Training Category = Type II General

The employee is required to keep current with the completion of all required training.

THERAPEUTIC STRATEGIC INTERVENTION (TSI)

Supports safe working environment; practices the strategies and intervention that promote a therapeutic milieu; applies and demonstrates knowledge of correct methods in the management of assaultive behavior. Training provided during new employee orientation.

WORKING CONDITIONS

The working conditions vary from routine to intense. An employee working in this capacity is required to make unpopular decisions. The employee must be able to maintain a professional demeanor at all times and perform their work systematically and consistently, keeping within legal boundaries to prevent undue protests from contracts.

EMPLOYEE IS REQUIRED TO:

- Report to work on time and follow procedures for reporting absences.
- Maintain a professional appearance.
- Appropriately maintain cooperative, professional, and effective interactions with employees, patients/clients, and the public.
- Comply with hospital policies and procedures.
- The employee is required to work any shift and schedule in a variety of settings throughout the hospital and may be required to work overtime and float to other work locations as determined by the operational needs of the hospital.
- All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions.

Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain confidentiality at all times. Telework consistent with DSH Policy Directive 5338 will be considered with prior approval from management. Incumbent is expected to provide in-office coverage on a rotational basis.

The Department of State Hospitals provides support services to facilities operated within the Department. A required function of this position is to consistently provide exceptional customer service to internal and external customers.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights).

Employee's Signature

Date

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

Supervisor's Signature

Date
