

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION District 11 / PPM / Project Delivery Support	
WORKING TITLE Project Manager Assistant (PMA)	POSITION NUMBER 911-100-5393-004	REVISION DATE 1/29/2025

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 a Supervisor I, the Project Manager Assistant (PMA) provides support to Division Management and Project Managers (PM) in a broad range of document development, scope, scheduling, budgeting, programming, and analytical activities in the delivery of the District's Capital Program projects. Responsibilities includes monitoring, coordinating, managing, and analyzing all phases of a project including: Project Initiation Document (PID); Project Approval and Environmental Document (PA&ED); Plans, Specifications, and Estimates (PS&E); Right of Way Support and Capital (R/W), and Construction Support and Capital (CON).

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.

- Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Collaboration, Integrity, Pride)
- Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, Innovation)
- 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. (Equity, Employee Excellence - Integrity, Pride)
- 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. (Prosperity, Employee Excellence - Equity, Integrity)
- Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Prosperity, Employee Excellence - Equity, Innovation)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Prosperity, Employee Excellence - Collaboration, Innovation)
- 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. (Prosperity, Employee Excellence - Collaboration, Equity, Innovation)
- Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Prosperity, Employee Excellence - Collaboration, Equity, Innovation)
- 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. (Prosperity, Employee Excellence - Collaboration, Innovation, Integrity)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

35%	E	Coordinates, validates and processes all programming activities within the District, including but not limited to the development and maintenance of programming documents for all capital projects in the District such as State Transportation Improvement Program (STIP), State Highway Operation and Protection Program (SHOPP), Traffic Congestion Relief Program (TCIF), Proposition 1B, Senate Bill 1 (SB-1) and all Federal funds). Prepares funding updates to the Federal Transportation Improvement Program (FTIP) on schedule and accurately. Maintains a list to include funding types by State, Federal, Local and regulation to obtain. Maintains and oversees projects with funding expiration dates to file extensions if needed. Develops and monitors required budget capacity, anticipated and actual expenditures and cash flow. Collaborates with Project Managers (PM) and Assistant Project Managers (APM) to develop and implement project funding plans and agreements with external resources such as Cooperative Agreements (COOP) and Project Implementation Orders (PIO). Monitors projects over all phases of the project life-cycle. Develops relationships with various internal and external customers including multiple divisions within Headquarters (HQ), local agencies, and the Metropolitan Planning Organizations (MPO) to fund, program, and report on projects. Provides recommendations to decision-makers to ensure successful project delivery. Serves as subject matter expert on the laws, policies, regulations and procedures related to transportation project financing, project management concepts, and the Caltrans project delivery process which includes Project Management Directives.
25%	E	Assists the Project Manager with the preparation, modification and maintenance of project work plans utilizing Critical Path Method (CPM) techniques in the Project Resource and Scheduling Management System (PRSM) application. Reviews, analyzes, and evaluates project data; recommends allocation and schedule adjustments to Project Managers; researches and responds to project schedule adjustments and direct or re-direct resources to accomplish project deliveries. Analyzes, interprets, and provides recommendations on the data to forecast potential issues.
25%	E	Prepares all Cooperative, Relinquishment, Highway Improvement, and Contribution Agreements (Agreements), as well as Project Implementation Orders (PIOs) for the Programming/Cooperative Agreements Unit utilizing the Project Agreement Construction Tool (PACT Tool) and Microsoft Office Suite for Project Managers. Coordinates the review and District/Headquarters approval of these Agreements and PIO's by the assigned Project Manager's Team. Regularly maintains and provides status updates on the tracking log for all executed and pending Agreements and PIO's. Works independently or in a team environment researching and analyzing project data providing necessary information in an accurate and timely manner.
10%	E	Identifies SB-1 projects by phase; Prepares, monitors, and tracks SB-1 project delivery lists and project location maps. Tracks milestones for SB-1 projects and all SB-1 programs including SHOPP, Trade Corridor Enhancements Program (TCEP), Solutions for Congested Corridors (SCC), Local Partnership Program (LPP), Active Transportation (ATP) and others. Assists with Baseline Agreements and other SB-1 related programming and reporting documents. Coordinates, facilitates, and communicates departmental activities related to SB-1 programs such as the tracking and reporting of SB-1 funding with internal customers including the SHOPP, ATP, STIP. Coordinate efforts with stakeholders on behalf of the department to insure accurate transparency regarding SB-1 efforts. Maintains communication with HQ SB-1 Program regarding related guidelines and requirements. Implements strategies to disseminate information and receive buy-in from stakeholders.
5%	M	May represent the Division and District on committees related to the above-mentioned areas. Organizes meetings with staff and management from various programs to discuss project issues, deliverables, status, risks, and lessons learned. May act as meeting facilitator. Participates in efforts to improve the effectiveness and efficiency of Program Project Management, which may include the training and development of others within the Division.

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, but may act in the lead capacity over less experienced staff or as the lead for special projects.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership. The incumbent must have comprehensive knowledge of purpose and function of Caltrans

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DOT PM-0924 (REV 01/2025)

systems and software including California Transportation Improvement Program System (CTIPS), AMS Advantage, Info Advantage, Office Engineer Database, State Highway Operations & Programs SHOPP Tool, Project Agreement Construction Tool (PACT), Federal Aid Data System (FADS) Data Link, Project Change Request Database and PRSM. SANDAG - ProjectTrak. Must have knowledge of computer applications (e.g., personal computer hardware and software, including Outlook, Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Oracle, FileMaker Pro).

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, in both written and verbal communication; 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 course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees. Must have the ability to advise others on a wide variety of subject-matter areas, present ideas and information effectively, develop and evaluate alternatives, gain and maintain the confidence and cooperation of those contacted during the course of work, coordinate the work of others, act as a team member. Must possess excellent organizational skills, set priorities, and meet deadlines.

Must have knowledge of principles and processes for providing excellent customer service including the assessment of customer needs, meeting quality standards for service, and the evaluation of customer satisfaction. Must be able to analyze information and use logic to address work-related issues and problems. Must demonstrate dependability in fulfilling responsibilities and a cooperative attitude. Must be able to adapt to changing priorities and direction. Must have the ability to act independently, openmindedness, flexibility, and tact.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Responsible for performing work to a high degree of accuracy. Reports produced may be used both internally and externally. Inaccurate information can result in negative publicity for both Caltrans, SANDAG and ICTC.

PUBLIC AND INTERNAL CONTACTS

This position requires frequent communication with deputies, supervisors, project and functional managers, and coworkers throughout the district, as well as SANDAG, ICTC, local agencies and headquarters staff.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit or stand for long periods of time using a personal computer and various software applications, file documents, attend or lead meetings, and perform other office-related duties. Must be able to concentrate, focus intently, and analyze complex data sets. Must be able to respond appropriately in a busy office environment. May be required to handle several issues at a time and should be able to prioritize tasks as necessary. Must be able to grasp technical information, formulate effective strategies and then communicate those complexities in a manner that is well understood by the receiver of the information. Must have effective, tactful ways of dealing with challenging situations. Must be able to develop and maintain productive working relationships.

WORK ENVIRONMENT

The base of operation is in the District office. While in the office setting, the incumbent may be working in a cubicle, in a climate controlled environment with artificial lighting. Multi-floor buildings are equipped with elevators and stairs. However, due to periodic energy conservation requirements, the building temperature may fluctuate. May be required to travel. Possession of a valid driver's license is required to operate a State owned or leased vehicle.

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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
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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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