

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Supervisor I	OFFICE/BRANCH/SECTION District 4/Business Management/PY/PS\$ Position Management	
WORKING TITLE PY/PS\$ Position Management Branch Chief	POSITION NUMBER 904-031-4800-xxx	REVISION DATE 08/03/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

In the Office of Business Management, under the supervision of a Supervisor II, the incumbent serves as the District's expert on PY/PS\$ Position Management. The incumbent will monitor the District's Personnel Years (PYs) and Personnel Service Dollars (PS\$) expenditures based on allocation and projections and provide recommendations when necessary. Additionally, the incumbent will assist the Divisions with their hiring needs.

CORE COMPETENCIES:

As a Supervisor 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.

- Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Safety, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, People First, Pride, Stewardship)
- Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, Stewardship)
- Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Safety, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, Pride, Stewardship)
- 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 - Collaboration, Innovation, Integrity, Pride, 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. (Safety, Equity, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- Understanding Others/Motivation:** Understands why groups do what they do and their motivation. Is able to look from multiple perspectives in order to understand others. (Safety, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- 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. (Equity, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity)
- 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. (Safety, Equity, Prosperity, Employee Excellence - Collaboration, Innovation, 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. (Prosperity, Employee Excellence - Collaboration, Integrity, Pride)

TYPICAL DUTIES:

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

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35%	E	Responsible for monthly reporting to management of Personnel Years (PYs) ad Personnel Service Dollars (PS\$) expenditures. Responsible both personally and through staff for research and studies on budget issues, alerting the Supervisor II to potential problems, and developing and recommending appropriate solutions to ensure expenditures are in compliance with budgetary allocations. As a District PS\$ and PY expert, is also responsible for presentation of technical and complex reports of both actual and projected (PY and PS\$) expenditures to (District and Headquarters) management by Program, Component and in some cases by Fund type. Incumbent maintains active liaison with HW Division of Budgets and HQ Programs Representatives to ensure allocation information, reporting practices and policy implementation is current. Reviews and analyzes Allocation Change Requests (ACR) to determine impact on District Programs. May serve as a member of Statewide budget teams addressing such issues as the development of new or improved financial reporting systems.
30%	E	Responsible for all District position management activities: Development and maintenance of the District's staffing plan, ensuring compliance with the District's Activity Plan. Ensures compliance of requests with the staffing plan, reviewing and approving Position Action Request Forms, responding to HQ and Program inquires regarding vacancies. Takes the actions necessary to protect positions and funding from abolishment under the government code. Responsible for tracking the District's position, utilizing the Department Position Tracking Automated Systems (PTAS) as a baseline, ensuring accurate accounting of transaction in process, and the accounting of vacancies and appointments as notified by Headquarters and District staff. Through close coordination with staff of Headquarters Personnel Operations, Headquarters Position Control and Headquarters Budgets, ensures District PARFs are processed within (Department, State Controllers Office, and Department of Finance) position management guidelines. Directs the identification, research and resolution of discrepancies, assisting with and responding to the most complex cases.
25%	E	Responsible for reports to District management detailing such information as persons on board and vacancies by Office. Responsible for the development and presentation of reports to District management detailing new hires by classification, and attrition by classification and program, to assist management with hiring and operational plans.
10%	M	Responsible for the District's State Controller Cost Center, Time Reporting System Cost Center, and Functional Codes for the District. Analyzes reorganization proposals to determine impact on these systems, determine the actions necessary to realign the cost centers and function codes, and implements such. Responsible for proper application and usage of accounting codes in accordance with the Work Breakdown Structure.

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
This position will supervise 4-5 Caltrans Analyst I/II positions.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
This position requires excellent oral and written communication skills. Incumbent must have well-developed skills for dealing effectively with all levels of Caltrans personnel. The position requires the technical expertise and experience to perform complex budget analysis, and develop and present budgetary recommendations. Information provided by the incumbent must be accurate, as it is critical in providing management the ability to forecast hiring needs in order to fulfill program demands. Incumbent must have the skill and experience necessary to provide advice and consultation to District staff, including management , on staffing issues. Incumbent must have knowledge of the mission and goals of the Department of Transportation and the District. Must have knowledge of the Department's budgetary and fiscal processes and goals, knowledge of the Department and District programs and organizational structure; knowledge of position allocation and control processes and applicable government codes; knowledge of the basic principles of accounting, principles of organization and management, research techniques and statistical principles and procedures; knowledge of the legislative process and departmental budget policies and procedures. Incumbent must be capable to performing duties of the position and producing accurate and detailed products under often stressful, tight time frame situation. Incumbent must have well-developed personal computer skills and thorough knowledge of such application and databases such as: Excel, Word, Access, Filemaker Pro, EFIS (Advantage, infoAdvantage), Datalink, ROAD, and PRSM.

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

In a district as large as District 4, the magnitude of the personnel budget is quite complex and extensive. The incumbent, as an expert on budgetary, fiscal and Position Control issues, will make and be held accountable for difficult and complex job-related decisions. Immediate fallout of uncorrected errors could necessitate adjustments at the District, Program or State legislative level. Unchecked errors in decisions or analysis of data could result in problems affecting the ability of the District to meet program and project commitments, thereby impacting the Department's ability to ensure the mobility and safety of the traveling public; adverse impacts to the Department as the loss of PYs, positions and PS\$, and could result in such adverse effects to employees as transfers, demotions, promotional freezes and layoffs. Errors in analysis of position data or position management decisions could result in loss of positions, Personnel Years (PYs) and Personnel Services dollars, adversely affecting the District's ability to meet program commitments.

PUBLIC AND INTERNAL CONTACTS

This position has no public contact.

Internal contacts are quite extensive. Incumbent will maintain constant liaison with HQ Budgets, HQ Position Management, HQ Personnel Operations, and HQ Program Managers and Liaisons. District contacts will include Division, Office and Program Liaisons, and will be at all levels of the organization, from entry level staff to executive level management. Contacts will assign offices involve areas of concern from overtime usage, temporary help, and staffing, to monitoring program expenditures and providing recommendations. Contacts with top level management involve budget planning and consultation regarding possible budget adjustments.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for a long period of time using a keyboard and video display terminal. Employee must have the manual dexterity necessary to operate the computer keyboard and various office equipment needed to complete task (such as PC, copier, fax, printer, scanner).

Employee must have the ability to multi-task; adapt to frequent, substantial and unexpected changes in the process and/or priorities; perform duties of the position under the stressful, tight time frames; ability to focus for long periods of time; and ability to work in highly intense situations, such as when network failure occur and immediate services are required. To carry out the functions of this position, the incumbent must be able to interpret and analyze printed materials and electronic materials; must be able to analyze request for assistance or data presented and reason appropriate action to be take, must be able to calculate ratios related to organizational plans; must be able to communicate ideas clearly by phone, in writing and by computer (email) to ensure accurate budgetary and position management information and instructions are disseminated; and must be able to maintain positive working relationship.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquarterd location. Business travel reimbursements considers an employee's designated Headquarters Location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquarterd location will be the responsibility of the selected candidate.

This incumbent will work in a workstation, in a climate controlled office under artificial lighting. Periodic problems with heating and air conditioning may cause the temperature and air flow within the building to fluctuate. Employee may be required to travel in state, but the travel would be very infrequent. Overtime may be required to accomplish projects with short deadlines, and vacations may be restricted during peak times.

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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.)

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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