

POSITION DUTY STATEMENT

DOT PM-0924 (REV 12/2024)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst II	DISTRICT 01/MAINTENANCE REGION SUPPORT - EUREKA	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Budgets, Purchasing, and Hiring Liaison	901-630-5393-918	12/31/2024

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 incumbent will be responsible as a Purchasing, Budgeting and Hiring Liaison working with District/Headquarters Budget Office, DPAC and Position Management. Independently manages, analyzes and monitors monthly budget resources for the Maintenance program, ensuring expenditures and encumbrances stay within allocations for the field budget. Compiles and monitors monthly budget report for crews, reporting out to area superintendents; prepares and submits annual budgetary requirements to Headquarters Budget Office; and makes recommendations to management regarding budgetary issues based on data he/she collects. Takes action to correct any erroneous charges and recommends cost-saving measures where applicable. Prepares department monthly spending plans and submits to Headquarters Budget Office. Incumbent will be responsible for all purchasing for area superintendents by seeking bids and processing requisition documents in a timely fashion. Responsible for the monitoring and tracking of the superintendents' areas hiring and completing all Post & Bid , PARF and ARF packages. In addition to Supervisor I support, the incumbent will be responsible for assisting the contract manager with encumbrance report monitoring, assist in seeking bids, resolving invoicing discrepancies, completing additional contracts for facilities, providing support for the Equipment Manager, Contract Manager, and HazMat Manager, and assist with inventory and radio inventory checks.

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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity, Pride)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **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 First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Innovation, Integrity)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Innovation, Integrity)

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- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Innovation, Integrity)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
30%	E	District 1's Maintenance Budget Liaison- Assist Supervisor I working with Headquarters Budget Office. Independently manages the programs budget by analyzing and monitors budget encumbrances, allocations and expenditures for the field budget, prepares and submits monthly and annually budgetary requirements to Headquarters Budget Office; makes recommendations to management regarding budgetary issues based on data he/she collects. Takes action to correct any erroneous charges and recommends cost-saving measures where applicable. Prepares and analyzes the crews budget and reports out to Area Superintendents monthly regarding spending plans to keep them within allocations.
30%	E	Hiring Liaison: Independently works with 10-11 supervisors and 2 superintendents to analyze classification specifications, researches classifications standards, utilizes advanced writing skills in order to draft and recommend desirable qualifications for duty statements, application screening criteria, and related interview questions to assist the hiring manager in conducting a successful recruitment that meets the unit's needs. Under the guidance of HQ Division of Human Resources (DHR) acts as a generalist on hiring practices and methods that meet the policy and regulations of DHR and Bargaining Units MOU. Acts as the Field Maintenance coordinator with the Office of Classification and Hiring, preparing PARF/ARF hiring packets, review duty statements, develop job postings for Post and Bids and ECOS, organization charts, position justifications, and preemployment inquiry approvals. Monitors and tracks position movement and vacancies via excel, updates organization charts for both permanent full time and intermittent Maintenance employees. Access the Exam and Cert Online System (ECOS) to print applications and review applications to determine minimum qualifications for pre-eligibility for some entry level classifications and DHR approval. Acts as lead in employee interview scheduling, interview preparations, employee notification letters and preemployment testing. Acts as Post and Bid coordinator, composing and submitting advertising, receiving Post and Bid forms and verify seniority. Completes and submits documents for employee's computer database rights and to establish employee identification numbers. Provide monthly feedback to supervisors and superintendents on the status of hires. Work in CalHR's Exam and Cert Online System (ECOS) to monitor all advertised positions posted for accuracy, pull application list report and applications from the ECOS system and forward to supervisors/superintendents for review, forward screening criteria to HQ for approval to interview applicants, make appointments for interviews and send required letters based on eligibility for interviews, upon final selection of applicant communicate with HQ on approval to extend final offer to hire, complete hiring actions within ECOS system, sign employees up for NEMO/MEBO classes, set up new employee accounts, work closely with the District's Personnel Transactions Liaison to schedule new hire orientation. Process drug testing paperwork and monitor the timely return of this paperwork with the Personnel Operations Liaison for clearance to hire. Must be able to plan and adhere to strict time-frames for hiring/preemployment deadlines. Must have the ability to compile, analyze and evaluate personnel data and present data to Management with recommendations which may include alternatives for resolution and formulated action plans. Evaluates the hiring process to improve efficiency, processes, and procedures. Must be organized.
30%	E	Maintenance Purchasing Liaison: In compliance with the Department's Acquisition Manual, procures needed merchandise/materials through the Purchasing Service Center, the Sacramento Materials Distribution Warehouse, and outside vendors; by use of contract delegation purchase requests and/or visa; advise Maintenance Supervisors on proper coding of procurement documents. Solicit competitive bids, prepare procurement documents, track encumbrances via excel and complete invoice receiving records to apply payments.
5%	M	Perform crew inventory and radio inventory checks with assigned supervisors when requested by District Property Control for assigned crews. Work closely with District Property Controller and process necessary paperwork to keep inventory accurate at all times. This will require occasional travel throughout the district to perform annual inventory audits. May require overnight trips. Back up warehouse operations.

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5%	M	Analyze and have a good understanding of Policy Directives and Manuals and communicate them to the entire staff. May be assigned to special projects as needed, and may be required to travel to other sites. Participates in scheduled training and meetings.
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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 does not supervise. May act as a lead and provide guidance to various Warehouse and Region Office staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must be able to work successfully both independently and as part of a team. Must be able to establish and maintain cooperative working relationships. Must be able to carry out assignments expeditiously and completely. Must collect, develop, categorize, maintain, and summarize information. Must be capable of creative, logical thinking and open to new or different ideas and opinions. Strong computer skills, particularly in Excel, are required. Incumbent must be able to communicate clearly and effectively both verbally and in writing and be able to handle sensitive financial concerns expeditiously and with a strong sense for customer service. Must be familiar with current department policies, organizational programs, and practices in business plans and program management.

Analytical Requirements: Ability to reason logically and creatively using various analytical techniques; present recommendations and alternatives to management in oral and written form; evaluate existing process and develop improvements; and identify problems and propose effective, efficient recommendations for resolution. Must be able to analyze and evaluate conflicting information, make determinations, follow through on problem resolution, and make effective recommendations and proposals.

Knowledge of modern office methods and equipment and ability to maintain detailed and accurate records. Must have knowledge of a wide variety of manuals, MOU's, Policy Directives, etc., and ability to implement instructions.

Ability to perform difficult analytical work independently, follow directions, set priorities, meet deadlines, communicate effectively, both orally and in writing, apply laws and rules, evaluate information and take corrective action, use tact and good judgment in dealing with the public and other employees. Must already possess working knowledge of computers and software - Caltrans specific programs such as Staff Central, CGI Advantage, plus Microsoft programs including Word and Excel.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Required to maintain good working relationships with members of the public, co-workers, other departments within Caltrans and other agencies. May have contact with other public agencies and private individuals almost daily in the course of assignment. Employee is expected to maintain a favorable public image for the State.

PUBLIC AND INTERNAL CONTACTS

Required to maintain good working relationships with members of the public, co-workers, other departments within Caltrans and other agencies. May have contact with other public agencies and private individuals almost daily in the course of assignment. Employee is expected to maintain a favorable public image for the State.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees may be required to sit for long periods of time using a keyboard and monitor. They may also be required to lift heavy binders and/or papers. Must be adept at working closely with other employees and supervisors and be a team-player.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under fluorescent lighting. There could be distractions such as noise; coworkers phone calls, employee discussions, etc. May be exposed to cold and warm weather while performing inventory audits. Will be required to wear appropriate footwear while performing inventory audits and working in the warehouse.

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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

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

SUPERVISOR (Print)	
SUPERVISOR (Signature)	DATE