

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION PPM&OE/Project Delivery & Structures Contract Mgmt.	
WORKING TITLE Contract Analyst	POSITION NUMBER 559-150-5393-026	REVISION DATE 08/10/2026

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 a Supervisor I of the Structures Contract Management Support Unit (SCMS) the incumbent, an Analyst II, will perform the more responsible, varied, and complex technical contract management and administration support by developing, preparing, and processing all aspects of various contracts. The Analyst II works independently and applies sound analytical techniques for assignments within the SCMS and independently handles the most complex, technical, and sensitive assignments, and requests, with respect, understanding, tact and professionalism. The Analyst II will independently provide program management support by monitoring program expenditures and creating reports to provide updates to internal and external customers.

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. (Employee Excellence - Innovation, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Integrity, 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. (Employee Excellence - Equity, 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 - Integrity, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Integrity, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - 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 - Collaboration, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Integrity, Pride, 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. (Employee Excellence - Integrity, Pride)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	In conjunction with Contract Managers, Caltrans Division of Procurement and Contracts (DPAC), Project Managers, Functional Units, and Headquarters contract personnel, the incumbent reviews and formats the Task Orders/ Service Requests, and contract scope of work for approval by reviewing and analyzing supporting documents. Analyzes and compares complex contract cost proposals and Task Order/Service Request cost estimates from Caltrans' consultants to ensure compliance with current State and Federal laws and regulations. Collaboratively works with functional subject matter experts to verify the appropriate use of classifications for the work required, labor rate, and overhead rate per the executed contract. Requests and reconciles accounting reports with contract expenditures and encumbrances, identifies discrepancies and initiates corrective measures where appropriate. Monitors Task Orders/Service Requests for expiring timelines, potential Supplements, and Termination Reports.
25%	E	Independently performs complex, comprehensive, and detailed analysis of consultant, sub-consultant and vendor invoices for completeness, accuracy and compliance to Caltrans policies and procedures. Performs labor compliance to ensure the enforcement of Federal and State labor laws relative to employment in the areas of prevailing wage determinations, certified payrolls, apprenticeship and trainee requirements per the contract, and subcontracting. Ensures and tracks DVBE/DBE reports received, signed and distributed as required. Reconciles contract invoice data to the appropriate AMS Advantage expenditure reports for the contract managers and verifies expenditures do not exceed contract and task order allocated amounts. Contacts consultants requesting progress status and verifies invoices received.
15%	E	Assists Contract Managers with processing complete contract procurement package including but not limited to contract pre-approvals, completed Service Contract Request (ADM0360), clear and concise Contract Scope of Work, Director's estimates, funding approvals, selection panel recommendations, conducting outreach events, creating panel binders for interviews, preparing ADA-compliant documents, and facilitating kick start meetings for the executed contracts.
15%	E	Maintains consultant contract files using the standardized contract filing system according to DES Structures Contract Management A&E Contract Management Manual. Tracks and updates required documents including but not limited to DVBE/DBE goal tracking sheet, cost report, contract survey, and expiring task orders/service requests. Updates performance and various Status Reports and other management information reports. Processes Overtime and Travel Authorization requests from consultants per the contract guidelines. Prepares close-out and archiving of contracts.
5%	M	Recommends updates and/or draft policies and procedures, job aids to implement efficiencies in Contracting Unit. Informs DES Management and other impacted stakeholders with the status of their Task Orders/Service Requests and invoices. Provides administrative back-up support to all team members as needed, including monitoring of shared email inboxes. Performs other duties as assigned.

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 other employees. The Analyst II may serve in a lead person capacity as part of a team effort in performing analytical work.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

- Laws, policies, and procedures related to State contracting and procurement.
- Management and Administration of contracts.
- English grammar and punctuation.
- Microsoft Office Software applications.
- Project delivery including process.
- InfoAdvantage experience and knowledge of Caltrans' Accounting system is preferred.

Abilities and Analytical:

- Excellent oral, written, and interpersonal communication skills.
- Strong analytical skills and attention to detail.
- Ensures confidentiality while interacting with all levels of staff and management.
- Applies sound judgment and makes independent decisions.
- Exemplary customer service skills.
- Ability to multi-task and meet multiple deadlines in a timely manner.
- Can independently conduct research and analysis utilizing available resources.
- Works cooperatively with staff at all levels in the organization.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

Proficiency in Microsoft applications such as Word, Excel, Outlook, PowerPoint, Teams.
Possesses strong organizational skills.
Thinks clearly and quickly to solve problems and offer solutions.
Reason logically and learn rapidly.
Work independently and as a team member.
Follows direction.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

This position requires the incumbent to be able to anticipate problems and identify issues that may affect the delivery of specific and on-call contracts. Failure to accurately monitor and report the expenditures of State and federal funds could lead to inappropriate payments being made to the consultants. Errors in judgment or decisions could impact the SCMS requirements of compliance with regulations, guidelines, and internal policies.

PUBLIC AND INTERNAL CONTACTS

The position requires regular verbal and written contact with outside engineering consultants, professional personnel from DES and Headquarters.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using keyboard and video display terminal, which may include viewing small font types for extended periods. Employee may be required to transport a laptop computer and portable printer while on field visits. Employee may be subjected to high levels of stress related to project delays, cost and schedule changes. Must be able to develop and maintain cooperative working relationships and behave in a fair and ethical manner toward others and demonstrate a sense of responsibility and commitment to internal and external customers. Must be able to balance multiple priorities and meet strict deadlines. Must be able to make decisions and take appropriate action. Must be able to research and compile data.

WORK ENVIRONMENT

Employee may be required to sit for long periods of time using keyboard and video display terminal, which may include viewing small font types for extended periods in artificial lighting. The incumbent will also telework according to telework guidelines and as directed by management.

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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