

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst IV	OFFICE/BRANCH/SECTION Director Office/ Office of the Federal Liaison	
WORKING TITLE Federal Legislative Manager	POSITION NUMBER 900 085 5403 XXX	REVISION DATE

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

GENERAL STATEMENT:

Under the general direction of the Federal Liaison, the incumbent serves as the Federal Legislative Manager and a subject matter expert on federal transportation legislative and policy matters, managing complex and highly sensitive aspects of Caltrans' federal legislative, policy, and strategic outreach portfolio. The incumbent functions as a key departmental resource on federal transportation policy and independently performs complex, critical, and specialized assignments with department-wide and statewide impact. The incumbent independently tracks, researches, evaluates, and analyzes federal transportation legislation, regulations, notices, policies, funding programs, and emerging federal initiatives to determine potential impacts on Caltrans operations, programs, funding, and the statewide transportation system. In coordination with Caltrans programs and districts, the incumbent develops strategies, recommendations, and policy options that advance Caltrans' mission, vision, values, goals, and other guiding principles while preserving the Department's operational capability and flexibility. The incumbent serves as a project leader and coordinates cross-functional efforts involving Caltrans programs and districts and other internal and external partners on complex federal legislative, regulatory, and policy initiatives. This includes coordinating the development and implementation of strategies related to federal surface transportation legislation; supporting implementation of the Infrastructure Investment and Jobs Act (IIJA) and future federal surface transportation reauthorization legislation; evaluating new or changing federal requirements and operational processes; and developing strategies and recommendations to improve departmental programs, policies, processes, and approaches in response to evolving federal requirements and priorities. As a subject matter expert, the incumbent independently, and in coordination with Caltrans programs, develops federal legislative concepts and proposals; conducts complex legislative, policy, and programmatic analyses and research; and prepares recommendations, reports, white papers, briefing materials, memoranda, presentations, and other products for executive-level consideration. The incumbent serves in a consultative and advisory capacity to the Federal Liaison, Caltrans Directorate and Executive Management, and other senior officials regarding significant federal transportation policy, legislative, regulatory, programmatic, and funding matters and presents complex information, policy options, and recommendations to executive leadership and other internal and external audiences. The incumbent develops and maintains effective working relationships and coordinates extensively with the Caltrans Directorate and Executive Management statewide, Caltrans Legislative Affairs, headquarters programs and districts, the California State Transportation Agency (CalSTA), the Governor's Office, other state agencies, federal agencies, Congressional offices, national transportation organizations, and other transportation stakeholders. The incumbent represents and advances Caltrans' interests on federal transportation matters and identifies opportunities for strategic collaboration, innovation, and policy development. The ability to exercise a high degree of independent judgment, provide expert-level analysis and recommendations, coordinate the work of others on complex initiatives, and establish effective relationships with internal and external partners is critical to the successful performance of the position.

CORE COMPETENCIES:

As an Analyst IV, 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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)

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- **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, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
45%	E	Coordinates and supports the development and implementation of federal transportation policy strategies that advance California's transportation goals and Caltrans' mission, priorities, and operational needs. Serves as a subject matter expert and key resource to the Federal Liaison on complex federal transportation policy, regulatory, funding, and program implementation matters. Develops short- and long-term strategies and recommendations related to federal transportation programs, policies, funding opportunities, and emerging federal initiatives. Independently researches, analyzes, and evaluates federal regulations, notices, Notices of Proposed Rulemaking (NPRMs), Requests for Information (RFIs), funding and program guidance, and other significant federal actions to determine potential department-wide and statewide impacts. Coordinates cross-functional review by Caltrans programs and districts; synthesizes technical and policy input; and develops, facilitates, and coordinates departmental comments and recommendations on significant federal actions. Evaluates proposed and new federal requirements and identifies potential operational, policy, programmatic, or funding implications for Caltrans and California's transportation system and develops recommendations and strategies for improving departmental policies, programs, processes, and approaches in response to changing federal requirements. Coordinates strategic outreach and engagement with federal agencies, Congressional offices, national transportation organizations, other state departments of transportation, non-governmental organizations, and transportation stakeholders to advance California's federal transportation priorities. Supports implementation of the Infrastructure Investment and Jobs Act (IIJA), future federal surface transportation reauthorization legislation, and other significant federal transportation initiatives. Coordinates and prepares responses to federal policy and legislative inquiries, formal correspondence, and other requests involving complex or sensitive federal transportation matters.

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50%	E	Independently monitors, researches, evaluates, and analyzes federal transportation legislation and Congressional activity of interest or concern to Caltrans and assesses potential impacts on departmental programs, operations, funding, and the statewide transportation system. Tracks federal legislation throughout the legislative process, including committee and subcommittee activity, hearings, markups, floor consideration, appropriations activity, and other Congressional actions. Researches complex and sensitive emerging issues; solicits and evaluates input from Caltrans programs and districts and appropriate external stakeholders; and develops strategies and recommendations to advance desired federal legislative outcomes or address proposals that may adversely affect California's transportation interests. Monitors and reports on Congressional hearings and other significant federal legislative proceedings and, as appropriate, coordinates preparation of Caltrans executives and subject matter experts participating in federal hearings, briefings, meetings, and other Congressional engagements. Serves in a consultative and advisory capacity to the Federal Liaison and executive management by developing timely analyses, strategic recommendations, and policy options regarding significant federal legislative developments and their implications for the Department and statewide transportation system. Coordinates the development and periodic update of Caltrans' federal transportation priorities, legislative concepts, and policy proposals. Serves as a project leader for complex, cross-functional legislative initiatives, coordinating with Caltrans programs and districts, Caltrans Legislative Affairs, the California State Transportation Agency (CalSTA), the Governor's Office, other state agencies, and external partners and stakeholders to develop proposals, identify statewide priorities, and support alignment with state transportation goals and strategies. Develops and recommends strategies for engagement with Congress, federal agencies, and national transportation organizations on significant federal transportation matters. Independently prepares, coordinates, and conducts executive-level presentations, legislative and policy analyses, briefing materials, talking points, white papers, memoranda, reports, and policy papers that clearly identify complex issues, assess potential impacts and alternatives, and provide recommendations for consideration by the Federal Liaison, Caltrans Directorate and Executive Management, CalSTA, and the Governor's Office.
5%	M	Upon designation, represents the Federal Liaison and the Office of the Federal Liaison at internal and external meetings, briefings, working groups, task forces, committees, and other forums involving federal transportation policy, legislative, regulatory, funding, and programmatic matters. Provides subject matter expertise and communicates departmental priorities and positions, as appropriate. May act on behalf of the Federal Liaison during the Federal Liaison's absence or as otherwise designated. Performs other duties appropriate to the classification and consistent with the operational needs and responsibilities of the Office of the Federal Liaison

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 have formal supervisory responsibility. The position does; however, have significant project leadership and coordination responsibilities. The incumbent is expected to bring together staff from different Caltrans programs and districts and, when appropriate, other agencies and stakeholders to complete major federal legislative and policy assignments. They may establish timelines, coordinate assignments and input, provide guidance on the federal issue, review and synthesize information, and coordinate development of the final product or recommendation. This leadership is based on the incumbent's federal transportation expertise and responsibility for the assignment rather than formal supervisory authority.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must be knowledgeable of Caltrans' mission, goals and programs; laws, rules and policies of the State of California and the federal government regarding transportation issues. Must be able to communicate effectively in both writing and speaking in respond to the steady flow of inquiries from interested citizens, legislators, other State agencies, other states, foreign governments, and the federal government on a wide variety of transportation issues. Must be able to perform effectively under rigid time constraints and pressure.

The ability to plan, organize and direct outreach efforts through the use of consultants and cooperate with governmental agencies and other partners. Conduct completed staff work, including analysis of major issues; work effectively with advisory and steering committees, governmental agencies, the private sector, other institutions and the general public; communicate effectively, both orally and in writing, and present controversial and complex reports clearly and succinctly. Effectively recommend policy, and know computer applications of Microsoft Word (word processing), Microsoft Excel (spreadsheet) and Microsoft PowerPoint, and be able to navigate the World Wide Web.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Decisions and commitments have an impact on all statewide Departmental programs. Expert advice to top management is

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essential to avoid errors that could expose the Department to criticism from the legislature and seriously restrict the operating capability and flexibility of the Departments and loss of federal funds. Inappropriate use of resources and failure to achieve program goals and objectives could occur.

PUBLIC AND INTERNAL CONTACTS

The incumbent has frequent contact with all levels of management in the Departments including other Districts and programs. In addition, this position has contact with and from all levels of government including others states, the federal government, other countries, and the public and private sector.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Working hours will be set sometime between 6:00 a.m. and 6:00 p.m. The incumbent may be required to travel in-state and possibly out-of-state. Incumbent may be required to sit for long periods of time using a keyboard and video display terminal. The incumbent must be able to interact with many people, and it is important that the incumbent work with others in a cooperative manner. he incumbent must be able to deal effectively with pressure, maintaining focus and intensity – yet remaining optimistic and persistent, even under adversity. Incumbent must be open to change when presented with new information and adapt behavior and work methods that respond to new information, changing conditions, or unexpected obstacles. Incumbent must behave in a fair and ethical manner toward others, and demonstrate a sense of responsibility and commitment to public service. The incumbent must value cultural diversity and other individual differences in the workforce.

WORK ENVIRONMENT

The incumbent must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Incumbent must be able to concentrate in order to review and create documents and meet strict deadlines. Incumbent must be able to efficiently use office equipment such as copier, facsimile machine, and document scanner.

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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