

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Division of Procurement and Contracts	
WORKING TITLE Purchasing Analyst	POSITION NUMBER 702-019-5393-013	REVISION DATE 02/2026

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 in the Division of Procurement and Contracts (DPAC), the employee is responsible for performing the more technical and complex purchasing functions and assisting associate analysts in the performance of their duties. The successful candidate must adhere to ethical practices and policies, ensure best value for the State, and demonstrate a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds customers' expectations.

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 - Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Innovation)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Safety - Collaboration)
- **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 - People First)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Climate Action - Innovation)
- **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. (Prosperity - People First)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Equity - Innovation)

TYPICAL DUTIES:

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

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50%	E	Responsible for analyzing and processing a wide range of purchase requests for commodities such as equipment, materials, office supplies, subscriptions, publications, information technology (IT), and non-IT. Prepares solicitations, develops forms, training material and other documents; assists internal programs with Statement of Work (SOW) development. Evaluates solicitation packages, price quotes, bids; makes awards and writes Purchasing Authority Purchase Orders (STD.65), Agreement Summary (STD.215), and Contracts (STD.213). Procures purchase orders and contracts using various acquisition methods (e.g. Statewide contract, Leveraged Procurement Agreement, CMAS consultant services, Small Business (SB)/ Disabled Veterans Business Enterprise (DVBE) Option, State Price Schedule, Delegated Purchasing Authority, competitive bidding, etc.) and calculates bidding preferences. Obtains acquisition internal and/or external approvals. Completes purchase registrations and required forms for submittal and the acquisition file. Distributes completed acquisitions, maintains purchasing files, and required documentation as necessary for required reports and post-audit review. Performs reviews of CAL-Card purchases and makes compliance recommendations accordingly. Serves as liaison with the Department of General Services (DGS), internal programs, and districts to obtain statewide commodity contracts including reporting and tracking. Serves as an advisor and liaison between Department of Transportation (DOT) and Department of General Services (DGS) in the development of solicitation, SOW, purchase estimates, and purchase orders over the DOT purchasing delegation. Accomplishes tasks in accordance with all applicable statutes, the State Contracting Manuals, the DPAC Acquisitions Manual, the purchasing delegation from DGS, and the State Administrative Manual. Serves as liaison between the division, districts and programs. As lead analyst, trains co-workers and reviews their work prior to manager approval.
20%	E	Enters data into financial system (Advantage) to create and obtain approvals for each acquisition. Researches data in Cal eProcure (online marketplace portal for businesses). Prepares and distributes the Contract Awards Report. Prepares weekly status reports on work progress and assist in preparation of mandatory statistical and audit reports for external distribution and website. Maintains internal database regarding purchase and project status.
20%		Works with customers individually and in task teams to review pertinent data and to provide guidance and advice on the best acquisition method. Works with SB/DVBE suppliers. Analyses, designs, develops, and implements, evaluates, and conducts procurement training including presentations at meetings, conferences, and workshops. Prepares policy bulletins and creates and/or updates acquisition manuals or procedures as required.
5%	E	Reviews and analyzes legislation and advises management on the departmental impact. Performs special projects.
5%		Serves as backup to other acquisition analysts and for other acquisitions teams. Acts in a lead capacity in the absence of the manager.

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

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The incumbent must have general knowledge of principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, management analysis, governmental functions and organization, State contract and procurement processes. Must have the ability to read, understand and apply law, rules, policy and procedures including those found in the Government Code, Public Contract Code, State Contract Manual, State Administrative Manual, Streets and Highway Code, applicable federal regulations, and applicable regulations of Caltrans and the various control agencies such as DGS and the State Personnel Board.

A high level of analytical and interpersonal skill is required. The incumbent must have the ability to analyze routine problems and recommend an effective course of action. The incumbent must have the ability to speak and write effectively and perform with some degree of independence. The incumbent must be able to make presentations and competently represent the Department. The incumbent must have the capability of working with personal computers and an aptitude for learning various software programs. Keyboard use will be approximately 75% of the time. The incumbent must be able to establish and maintain cooperative working relationships with managers, DOT employees, contractors, and internal/external customers. The incumbent must exercise tact and good judgment. The incumbent will be required to prepare and present findings and make

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recommendations on specific problems.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

At the journey level, the incumbent will be assigned the most complex work involving analytical tasks impacting the immediate work unit. The incumbent is responsible for assuring the proper purchasing of several million dollars worth of commodities/ services each year. Improper purchasing such as buying a large quantity of an item that cannot be used or indicating the wrong price for a commodity can cause large dollar losses. Errors or omissions could also result in violations of statutory requirements, causing audit citations or lawsuits against the state by private contractors or labor unions. Poor judgment could result in delays in completion of the Department's or other agency programs and loss of public trust.

PUBLIC AND INTERNAL CONTACTS

Within the department, the incumbent works individually and in task teams to communicate with districts and headquarters (HQ) staff at various levels to provide consultation and advice on purchasing policies and procedures. Confers with Branch Chiefs, Office Chiefs and other management regarding purchasing issues. Externally communicates with the DGS, vendors, consultants and other members of the business community.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent is required to sit for long periods of time using a keyboard and video display terminal. Requires the ability to develop and maintain cooperative working relationships. Incumbent must be able to sustain mental activity as needed for problem resolution, report writing, analysis, and reasoning.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial lighting.

May be required to travel or participate in training/outreach activities both in the districts and HQ program areas. Travel may occasionally be overnight. Overtime may occur and vacation restrictions may apply during peak processing times of each year. Telework may be supported.

Keyboard use is approximately 75% of the time.

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