

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Legal Division /Sacramento Office	
WORKING TITLE Property Controller, Facilities & Invoice Processing Analyst	POSITION NUMBER 701-001-5393-006	REVISION DATE 09/08/2026

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 the Office Manager, the incumbent independently performs the more responsible, varied, and complex professional-level asset management duties for the Sacramento office within the Legal Division. The analyst is responsible for managing property control process and all official asset inventory records. The analyst directly manages and maintains the asset inventory for personally assigned computer equipment (PCE). The analyst also processes invoices for the Sacramento office including managing the shared mailbox for invoices, tracking invoices, and submitting invoices for payment.

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)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - 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. (Employee Excellence - 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 - Innovation)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - Collaboration, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration)
- **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. (Employee Excellence - Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Integrity)
- **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)

TYPICAL DUTIES:

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

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30%	E	Performs asset management tracking and reporting functions for the Legal Division as required by State and departmental rules and regulations, including the State Administrative Manual, and the Caltrans Property Control Manual. Analyzes and interprets official State and departmental asset management rules, regulations, policies, and procedures in order to formulate, document, and administer property control, asset disposal, and asset inventory management processes and business practices for the Legal Division. Participates in statewide teleconferences and provides analysis, alternatives, and recommendations for development of departmental policies and procedures. Provides consultation, analysis, and recommendations to District 42 management and staff on asset management issues, processes, and business practices. Update internal and SNOW databases; Initiate orders for replacement devices; Submit SNOW requests for equipment related issues. Completes special assignments, projects, and drills, as requested. Coordinate with IT and Property Control Liaison in the development of bulk procurement orders and assist with analyzing division submissions. Receives and coordinates return, recycle, disposal, or survey of old or underutilized assets (e.g., computer equipment and universal waste).
30%	E	Monitors and reconciles shared invoice mailbox. Analyzes invoices for accuracy to ensure proper charging based on executed contracts. Processes all invoices including vendor billing, contract billing, and service needs to ensure timely payment. Maintains complete and up-to-date contract records and tracks fund balances. Collaborates and works directly with vendors, contract managers and Accounting staff to research and resolve discrepancies.
20%	E	Researches and analyzes sensitive and complex asset management transactions, including unauthorized acquisitions and misuse of assets, which can result in progressive disciplinary action. Traces and reports missing equipment to management, as necessary. Performs inventory reconciliation (monthly, annually, and/or every 3 years), as mandated and/or required, for all official asset inventory records, and in some instances conducts physical inventory of specific assets. Researches, evaluates, and resolves all discrepancies and ensures that assets are added, transferred, or removed from the official departmental inventory record, as appropriate. Prepares and provides reconciled inventory reports as mandated, required, or requested. Researches, evaluates, and resolves all discrepancies. Evaluates and responds to asset reconciliation audit findings.
10%	E	Submits Facilities Action Requests (FARs) to the Division of Business Operations and serves as the primary point of coordination for all facility-related needs. This includes tracking and monitoring FARs from initiation through completion, maintaining communication with the HQ Business Operations Center (BOC), and providing timely status updates to management. Supports space-related activities by assisting with workspace assessments, onboarding, offboarding, coordinating office moves, and identifying facility impacts or needs.
5%	E	Designs and develops tracking tools for the Legal Division asset management. Uses asset tracking system to record, reconcile, transfer, monitor usage, and assign each individual asset. Updates asset tracking system based on changes to processes and business practices. Creates asset management control forms as needed. Prepares, completes, and/or reviews all property control document prior to final submission. Ensures that all documentation is coded and processed appropriately and that all assets receive proper identification information (e.g., Caltrans Property Control Tag or Equipment Identification Number).
5%	M	Develops and implements processes and procedures for reporting, both standard and ad-hoc reports, using information from various databases and data sources. Incumbent will development of presentations as directed by management.

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.

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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of principles, practices, and trends of public and business administration, including budgets, program evaluation, or related areas; governmental functions and organization at the state level.

The incumbent must be knowledgeable of the Department's mission, goals, and programs; laws, rules, and policies of the State of California. The incumbent must possess knowledge of pertinent laws, statutes, and regulations regarding resources, contracts, and general office operations. The incumbent must be able to assimilate and evaluate technical and procedural input from various sources, develop alternative courses of action and make objective recommendations on all issues relating to this position.

The incumbent must have the ability to multitask, adapt to changes in priorities, and complete tasks with short notice. The incumbent must have the ability to effectively coordinate multiple assignments with concurrent due dates, and to recognize potential project-related problems with personnel, fiscal resources, or scheduling and either take or recommend corrective action. The incumbent must be able to manage and resolve conflicts and disagreements in a positive and constructive manner to minimize negative impact.

Knowledge of and ability to use personal computer equipped with e-mail (Outlook), word processing and spreadsheet software including Microsoft Office Suite (Word, Excel, and PowerPoint).

The incumbent must reason logically and creatively; utilize a variety of analytical techniques to resolve complex problems, develop communication documents and reports on a variety of issues, and maintain a level of professional integrity to ensure Department Policies and Procedures are followed.

The incumbent must be able to prepare complete and comprehensive reports, letters, and articles; make effective presentations, use good judgment for analysis of resource requirements; be able to coordinate effectively with all levels of management and employees.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for developing and administering the Legal Division asset management procedures and business practices, consistent with State and departmental rules, regulations, policies and procedures; developing processes and controls to maintain an accurate inventory of the Legal Division's assets; and reconciling departmental property control records and responding to audit findings related to assets of the Legal Division. Asset management is required by State and departmental rules and regulations, including the State Administrative Manual, and the Caltrans Property Control Manual.

PUBLIC AND INTERNAL CONTACTS

The incumbent has frequent contacts with District 42 management and staff statewide, as well as Headquarters' staff. The incumbent is expected to handle these contacts with professionalism at all times and gain and maintain the confidence and cooperation of those contacted during the course of work.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard/mouse and video display monitor, or while attending meetings. The incumbent must be able to use fine manipulation and/or simple grasping during the course of their workday. Some walking may be required. Incumbent may be required to lift and/or move objects weighing up to 50 pounds.

Must be able to effectively communicate in English and may be required to make presentations, lead workshops, and serve on quality teams. The incumbent must be able to sustain the mental activity needed to conduct necessary research, analysis, reasoning, auditing and editing, problem solving and report creation and writing.

Must be able to organize and prioritize large volumes of varied documents. The workload is subject to frequent, substantial and unexpected changes that could affect the scheduling or completion of assignments. The incumbent must have the ability and aptitude to utilize a personal computer to update, retrieve, and analyze information.

Must be able to handle multitask while regularly responding to e-mails and phone calls. This position requires the incumbent to be flexible and adaptable to changing policies, rules and regulations as it relates to personnel administration. Must be able to adapt to changes in priorities, and complete tasks or projects with short notice and work with others in a cooperative manner. The incumbent must have the ability to develop and maintain cooperative, collaborative working relationships with staff as well as other departmental employees and recognize emotionally charged and/or sensitive issues and problems and handle them effectively and appropriately. Employee must recognize and respond appropriately to difficult situations and priority issues arising within a dynamic work environment, and must facilitate effective solutions. Must deal effectively with pressure, maintain focus and intensity yet remain optimistic and persistent, even under adversity.

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The incumbent behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. The incumbent values cultural diversity and other individual differences in the workforce.

The incumbent must possess the ability to formulate effective strategies consistent with the Division’s business plan and develop new insights into situations and apply innovative solutions to make organizational improvements. The incumbent must have the ability to effectively coordinate multiple assignments with concurrent due dates.

WORK ENVIRONMENT

The incumbent will be exposed to various work environments. While at their base of operation, the employee will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. The incumbent may be required to sit and/or stand for extended periods of time. The incumbent will be using a keyboard/mouse and video display monitor. Some travel may be required, therefore, incumbent must be able to travel using a car or commercial transportation. The incumbent may be exposed to dirt, noise, and uneven surfaces.

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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CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION Legal Division /Sacramento Office	
WORKING TITLE Property Controller, Facilities & Invoice Processing Analyst	POSITION NUMBER 701-001-5157-XXX	REVISION DATE 09/08/2026

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

GENERAL STATEMENT:

Under the supervision of the Office Manager, the incumbent will assist in performing complex asset management duties for Sacramento Legal Division. The analyst directly manages and maintains the asset inventory for Sacramento Legal Division computer equipment and processes invoices for the Sacramento office including managing the shared mailbox for invoices, tracking invoices, and submitting invoices for payment.

CORE COMPETENCIES:

As an Analyst 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.

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- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - 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. (Employee Excellence - 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 - Innovation)
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TYPICAL DUTIES:

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

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30%	E	Performs asset management tracking and reporting functions for the Sacramento Legal Office as required by State and departmental rules and regulations, including the State Administrative Manual, and the Caltrans Property Control Manual. Reviews State and departmental asset management rules, regulations, policies, and procedures in order to formulate, document, and administer property control, asset disposal, and asset inventory management processes and business practices for the Legal Division. Participates in statewide teleconferences and provides analysis, alternatives, and recommendations for development of division policies and procedures. Assists with updating internal and SNOW databases. Initiate orders for replacement devices; Submit SNOW requests for equipment related issues. The incumbent will coordinate with IT and the Property Control Liaison in the development of bulk procurement orders. Receives and coordinates return, recycle, disposal, or survey of old or underutilized assets (e.g., computer equipment and universal waste).
30%	E	Assists with monitoring shared invoice mailbox. Analyzes invoices for accuracy to ensure proper charging based on executed contracts. Processes all invoices including vendor billing, contract billing, and service needs to ensure timely payment. Maintains complete and up-to-date contract records and tracks fund balances. Collaborates and works directly with vendors, contract managers and Accounting staff to research and resolve discrepancies.
20%	E	Traces and reports missing equipment to management. Performs inventory reconciliation (monthly, annually, and/or every 3 years), as mandated and/or required, for all official asset inventory records, and in some instances conducts physical inventory of specific assets. Assists with researching, evaluating, and resolving all discrepancies and ensures that assets are added, transferred, or removed from the official departmental inventory record. Prepares and provides reconciled inventory reports.
10%	E	Assists with Facilities Action Requests (FARs) to the Division of Business Operations. This includes tracking and monitoring FARs from initiation through completion, maintaining communication with the HQ Business Operations Center (BOC), and providing timely status updates to management. Supports space-related activities by assisting onboarding, offboarding and office moves.
10%	M	Works in conjunction with the other administrative staff to ensure assigned duties are covered during absences and peak periods. Provide other analytical and technical support as assigned.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
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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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