

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst II	District 12/ Strategic Portfolio Management/A&E Contracts, Coop	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Contract Analyst, Consultant Services Unit	912-280-5393-008	

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 Senior Transportation Engineer, Branch Chief of Architectural and Engineering (A&E), Consultant Services Unit (CSU), the Analyst II provides technical, analytical, and office administrative support for the Branch Chief of A&E CSU, Contract Managers, and Task Order Managers. The incumbent is responsible for varied and complex technical and analytical assignments, such as financial and analytical reports for the A&E programs. The incumbent ensures the correct and prompt processing of various documents related to A&E CSU, but not limited to task orders, invoices, claims, encumbrances, expenditures, and documents related to the A&E Contract Procurement Process. The incumbent will support the Branch Chief of A&E CSU with document management, meetings, events, and other operational needs.

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.

- Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Equity)
- Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Equity, Stewardship)
- 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. (Equity - Collaboration, 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 - People First, Stewardship)
- 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. (Employee Excellence - Innovation, Stewardship)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity, Employee Excellence - People First)
- 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 - Collaboration, Stewardship)
- Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Employee Excellence - Integrity, Stewardship)
- Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Pride, Stewardship)

TYPICAL DUTIES:

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

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35%	E	Supports, maintains, processes, and develops the Consultant Services Unit (CSU) database and various reports and tracking logs for A&E contracts, allocations, authorities, encumbrances, projections, and expenditures. Supports the preparation of the Monthly Performance Reports to Executive Management, including Capital Outlay Support Tracking (COST) Reports, Disadvantage Business Enterprise/Small Business Enterprise (DBE/SBE) reports, and other special ad hoc reports. Obtains and processes reports from various Contract Management Systems (CMS) databases. Maintains the integrity of the database information through comparison of Enterprise Resource Planning Financial Infra-Structure (EFIS) reported expenditures versus those recorded in the A&E CSU related databases. Makes recommendations for resolving issues and revising processes for continual improvements to A&E contracts, task orders & invoice processing, generating reports, status logs, and fund management. Reviews and promptly replies to various emails from Branch Chief, Contract Managers, and Task Managers, and as necessary with other functional units in District 12, headquarters, and other customers outside the Department.
30%	E	Reviews and analyzes consultant task orders and invoices for completeness and accuracy by ensuring compliance with contract requirements, cost proposal rates, approved personnel request rates, and task order terms, conditions, fiscal and budget provisions. Reviews, assesses, and monitors contract fund balances, making fund modifications for payment of invoices. Ensures compliance with prevailing wage requirements on contracts that include these provisions. Tracks contract and task order budget authority and expenditures by project identification codes and fund types. Processes various encumbrances, disencumbrances, fund transfers and extensions in CGI Advantage. Data entry, data management, processes and completes various forms, verifies and tracks Disabled Veterans Business Enterprise/Disadvantaged Business Enterprise (DVBE/DBE), and Small Business Enterprise (SBE) usage, transmittal of packages/emails, prepares various contract packages for approval by Branch Chief, Contract Manager, or Task Manager. Submits invoices and reports to District and Headquarters Accounting. Compares expenditures information for EFIS Reports to ensure all invoices are paid and that the payment matches projected expenditures. Required to sign confidentiality, Conflict of Interest Statements Certification, and other security related forms to perform various A&E CSU related duties.
30%	E	Communicates and coordinates with Headquarters, the District Capital Outlay Support (COS) Office, and other internal staff regarding consultant expenditures and reports. Perform required document management duties, including but not limited to, filing, copying, faxing, scanning, shredding, and sorting of various A&E CSU documents and files. Requires supporting A&E CSU meetings and events with general setup, compiling and updating reports, minutes, and tear-down within the Program and Project Management unit and completing various forms for related activities and events. Reviews, provides and develops comments and written narratives to Branch Chief regarding budgets, allocations, encumbrance, and other reports from automated sources by Contract and Fund source to ensure availability of funds. Supports the Branch Chief of A&E CSU in preparing contract processes, completing forms, assisting with interviews, copying and distribution of various documents, shredding sensitive documents, and properly filing.
5%	M	Supports the Branch Chief of A&E CSU with invoice preparation training to consultants at Contract Kick-Off meetings. Manages physical and electronic contracts, task orders, and invoices file retention and disposal by following audit requirements and Department retention policy. Manages the efficient organization of the retained files by reviewing the files for standard naming protocol to ensure on-demand availability. Supports ordering office supplies, equipment, manuals and other A&E CSU, as needed.

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

The incumbent will not supervise others, but may act in a lead capacity on specific assignments. These team assignments may be made up of members of the administrative and/or engineering classifications.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of the A&E CSU related activities and duties, contract management, contract procurement policies and procedures, including prevailing wage compliance and labor laws. General knowledge of budgetary procedures, fiscal and budget management, data analysis, and processing. Proficient at using word processing, excel spreadsheets, and spreadsheet data management. General knowledge of project development process, records and document storage policies and

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methods. Good judgment, reason logically, creatively and independently. Strong interpersonal and customer service skills, both orally and written. Manage multiple priorities and complete assignments accurately and timely. Ability to interact in team settings and contribute to team building. Ability to share and promote innovation and efficiency in the various A&E CSU procedures. Ability to clearly communicate and provide information with other team members for the purpose of training and disseminating of data and statuses.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent will be responsible for performing work in an accurate and timely manner by establishing priorities and exercising good judgment. Consequence of error or inability to perform in any aspect of the incumbents responsibilities may have adverse effect on the ability of the A&E CSU and the Division of Strategic Portfolio Management to ensure compliance with Contracts requirements and State and Federal requirements. Consequences of error may include payment of late fees to other entities and embarrassment to the A&E CSU.

PUBLIC AND INTERNAL CONTACTS

May require public speaking and presentations of reports and statuses of A&E contracts in meetings with internal and/or public. May require communication and coordination with other Districts, functional units within the Department, consultants, local government agencies, and private parties. When required, incumbent will represent the Branch Chief of A&E CSU in various internal and public meetings and events.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent is required to operate a computer workstation and various software applications, have phone communication, use a photocopier, scanner, office machines, file documents, and other office-related duties. The incumbent must be able to concentrate, focus intently, and analyze complex data sets while responding appropriately in a busy office environment. Must be able to handle several issues at a time, independently prioritizing tasks as necessary. Must be able to grasp technical information and formulate effective strategies and then communicate those complexities in a manner that is well understood by the receiver of the information. Deadlines will at times be short; for some staff this may create stress and so the incumbent must have effective, non-disruptive ways to dealing with the stress created by multiple priorities and deadlines while completing assignments. Incumbent in this position will be required to read fine, small font print on reports and documents. Incumbent in this position may be required to travel for State business. Possession of a valid driver's license is required when operating a state owned or leased vehicle.

WORK ENVIRONMENT

The base of operation will be in the District Office. While in the office setting, incumbent will be working in a climate-controlled environment with artificial lighting. Multi-floor building equipped with elevators and stairs. Work environment includes a constant interaction with a diverse group of customers and coworkers. This position may require sitting for long periods of time at keyboard and using computer monitor, and require repetitive motion processing activities.

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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
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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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