

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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|------------------------------------------------------------|-------------------------------------------------------|-----------------------------|
| CLASSIFICATION TITLE<br>Analyst II                         | OFFICE/BRANCH/SECTION<br>56/Maintenance/Fuel Programs |                             |
| WORKING TITLE<br>Statewide Bulk Fuel Program Administrator | POSITION NUMBER<br>913-660-5393-918                   | REVISION DATE<br>10/16/2026 |

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 Supervisor I ( Division of Equipment's Fuel Programs Management Branch Chief ) the Analyst II independently performs complex duties related to research, analysis, reporting, customer service, data review, and contract management (including inter-agency contracts) for the Department's Bulk Fuel Program statewide. Manages the statewide bulk fuel automation program by overseeing agreements, analyzing fuel transaction data, preparing reports, resolving discrepancies, and coordinating investigations of potential fraud, misuse, or fuel loss with internal and external stakeholders. The Analyst II provides backup support to the Bulk Fuel Invoice Processing Fuel Reporting, as needed. Overtime may be required during fuel emergencies.

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.

- Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - Innovation, Integrity, Stewardship)
- Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Innovation, 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 - Innovation, 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. (Employee Excellence - Innovation, Stewardship)
- Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Innovation, Stewardship)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Innovation, Stewardship)
- Negotiation:** Negotiates in a manner that results in positive business outcomes, while maintaining strong relations with the other negotiating member. (Employee Excellence - Innovation, 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 - Collaboration, Innovation, Pride)
- Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Collaboration, Innovation, Pride, Stewardship)

TYPICAL DUTIES:

| Percentage                              | Job Description |
|-----------------------------------------|-----------------|
| Essential (E)/Marginal (M) <sup>1</sup> |                 |

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| 30% | E | Serves as the Statewide Bulk Fuel Program Analyst, providing analytical and program support for the automated bulk fuel program. Supports the development, implementation, and administration of agreements for automated fuel services. Extracts, analyzes, and audits fuel transaction data from a cloud-based system to identify potential fraud, misuse, waste, or fuel loss. Prepares, distributes, and maintains monthly and ad hoc transaction reports for field staff and publishes program information on the intranet. Researches and resolves data discrepancies between contractors and field offices, ensuring data accuracy and program integrity. Investigates complex and sensitive issues, including suspected fraudulent activity, and serves as the primary liaison among DOE management, Caltrans Audits & Investigations, Legal, District and Division Management, and the California Highway Patrol to support investigations and resolve program-related issues.                                                                                                              |
| 25% | E | Serves as the subject matter expert for the Department's bulk fuel automation program, providing program guidance, customer service, technical assistance, and training to internal staff and external customers. Manages and responds to inquiries received through the bulk fuel program inbox and serves as a primary resource for program-related support. Coordinates the creation, maintenance, and administration of employee and fuel card accounts, ensuring appropriate system access and authorization levels are assigned in accordance with business needs. Works closely with the vendor to process account requests, updates, and system access changes. Develops and delivers statewide training on bulk fuel program policies, procedures, and system functionality by creating training materials, user guides, presentations, and reference resources. Collaborates with the vendor to coordinate and provide regular, refresher, and individualized training to support user knowledge, compliance, and effective use of the automated fuel management system.                   |
| 15% | E | Develops, maintains, and analyzes ad hoc and customized reports related to bulk fuel transactions, off-road fuel usage, fuel overage and shortage activity, and other program-specific requirements. Utilizes Microsoft Excel, Smartsheet, Access, Word, Advantage, and Outlook to support program administration, data analysis, reporting, and operational activities. Leverages business intelligence tools to develop and maintain fuel-related dashboards that support monitoring, decision-making, and program oversight. Maintains and updates the bulk fuel intranet site using Drupal, ensuring program information, reports, guidance documents, and other resources are accurate, current, and accessible to stakeholders.                                                                                                                                                                                                                                                                                                                                                                |
| 15% | E | Analyzes and interprets applicable laws, regulations, policies, and procedures, including the California Code of Regulations, Deputy Directives, Director's Policies, State and Federal laws, local air quality requirements, the State Acquisition Manual, and the State Contracting Manual, to develop, implement, and maintain policies, procedures, contracts, and operational practices supporting the bulk fuel automation program. Develops and updates program procedures related to cost tracking, invoicing, desk manuals, reporting, data auditing, and confidential reporting processes associated with suspected misuse or fraudulent activity. Evaluates program requirements, researches regulatory and operational changes, identifies alternatives, and provides recommendations to management to improve program efficiency, reporting capabilities, and business processes. Maintains comprehensive documentation of program policies and procedures and organizes, analyzes, and interprets data to support management decision-making, program oversight, and daily operations. |
| 10% | E | Develops, coordinates, and manages Interagency Agreements with Federal, State, and Local agencies that utilize the Bulk Fuel Program. Monitors agreement requirements and supports related documentation, communication, and coordination necessary to maintain program participation and billing accuracy. Using various computer programs, analyzes transaction data and allocates charges into Caltrans and other agency reports for invoicing purposes. Reviews discrepancies, coordinates with the vendor to resolve issues, and prepares monthly transaction invoice reports and supporting documentation. Submits materials to accounting for review and approval in a timely manner and in accordance with the Prompt Payment Act. Performs other job-related duties as required.                                                                                                                                                                                                                                                                                                            |
| 5%  | M | Performs other job-related duties within the scope of the classification as assigned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

<sup>1</sup>ESSENTIAL 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, but will act as team leader on bulk fuel and special projects.

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Thorough understanding of completed staff work (analytical techniques, organizational theory), principles of human relations, employee safety and health, business administration, State government administrative processes, and principals of data processing and automation. The Incumbent may be responsible for completing complex studies requiring data collection, analysis and development of alternatives, recommendations, presentations, and implementation plans.

The incumbent is responsible for independent actions and initiative in carrying out duties. The Incumbent shall be knowledgeable in the areas of Access database management, spreadsheet usage, document design and development, letter and memorandum preparation, and the ability to prepare reports using multiple software applications and methods. Incumbent will occasionally use accounting software such as AMS Advantage.

The Incumbent shall be able to: Analyze administrative problems and recommend the appropriate course of action; Recommend procedural changes; Communicate effectively to groups and individuals, within and outside of Caltrans; Organize materials, prioritize work activities, assignments, and deliverables effectively; and work independently, with a minimum amount of supervision.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in the management of service contracts could result in the under or over-payment to contract vendors. Failure to adequately manage vendor assignments could adversely affect maintenance activities and response times if the fuel dispensing system is affected. Failure to adequately manage bulk fuel, including insuring that automated sites follow the proper procedures when their site automation fails, could result in a significant under-reporting of fuel usage. Failure to insure that inter-agency agreements are in effect prior to other agencies use of bulk fuel, could result in lost revenues to the State. Late vendor invoice payments would result in payment of penalties.

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### PUBLIC AND INTERNAL CONTACTS

Incumbent will have regular contact with fuel and related vendors, Caltrans staff, other government agencies, equipment service personnel and the occasionally the public. These contacts may be by telephone, electronic mail or in person, The incumbent must be able to communicate effectively, and with professionalism, tact, and diplomacy.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements for this position include the ability to work for extended periods in a standard office environment, which may involve using a telephone, computer, keyboard, mouse, and monitor on a regular basis. Occasional travel to bulk fuel sites or meeting locations may be necessary, which can involve highway travel through urban and rural areas and walking on uneven surfaces. Some terrain or site conditions may result in minor jostling while riding in a vehicle.

Mental requirements for this position include the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. The position requires the ability to organize and prioritize large volumes of data and Information.

Emotional requirements for this position include interaction with many individuals at all levels of the organization and the ability to work together with other employees in a cooperative manner. The incumbent will have to consider, and respond appropriately to the needs, feelings, and capabilities of different people in many situations. Overtime may be required in the event of a fuel emergency which may cause stress due to short notices and fast turn around times being required.

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### WORK ENVIRONMENT

At the base of operation, the work environment will be a climate-controlled office or an open-space cubicle near other employees, under artificial lighting. Equipment used on a regular basis to complete tasks include mobile phone, computer keyboard, mouse, and monitor. Occasional travel may be required for bulk fuel site visits and/or meetings. Visiting the site may involve exposure to vehicular traffic, construction equipment, dust, weather extremes, and walking on uneven surfaces and climbing slopes. Occasional overtime work may be required to keep bulk fuel dispensing on-line and functional or in the event of an emergency that effects fuel infrastructure and delivery.

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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 |
|----------------------|------|

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

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|------------------------|------|
| SUPERVISOR (Signature) | DATE |
|------------------------|------|