STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst II	Legal Division /Sacramento Office	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Legal Operations Analyst	701-001-5393-XXX	10/21/2026

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 Resource Manager/Supervisor II, the Analyst II manages and reconciles inventory for Sacramento Legal Division, ensuring accurate records and efficient access to legal materials. Coordinates access to legal research databases and support the Legal Case Management system, facilitating reliable tools for litigation and reporting. The role assists with contract administration, purchasing, and vendor relations, maintaining compliance and timely payments.

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
25%	E	Conducts required inventory reconciliation monthly, annually, and at multi-year intervals for Sacramento Legal Division Library assets and performs physical inventory of designated assets when necessary. Researches, evaluates, and resolves discrepancies to ensure assets are accurately added, transferred, or removed from the official inventory system. Prepares and delivers reconciled inventory reports, and traces and reports missing assets to management. Oversees the organization and management of collections of legal materials, such as opinions, expert materials, appellate briefs, unpublished opinions, and audio or video content, to ensure efficient access and use. Establishes and maintains comprehensive computer-based inventory for these assets.

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20%	E	Coordinates and processes access requests for legal research databases such as Continuing Education of the Bar (CEB), LexisNexis, and Westlaw by registering new users, maintaining accurate user records, and ensuring staff have the appropriate credentials and permissions needed for statewide Legal Division operations. The incumbent also provides ongoing support for the Legal Case Management (LCM) system by responding to staff requests for LCM reports, assisting users with navigating system features, and tracking and resolving technical or data-entry issues in collaboration with LCM support personnel. In carrying out these responsibilities, the incumbent ensures timely, accurate, and reliable access to essential legal research tools and case-management data required for litigation, transactional work, and program reporting.
20%	E	Analyzes invoices for accuracy to ensure proper charging under executed contracts and processes vendor, contract, and service related billings to ensure timely payment while maintaining complete and current purchasing and equipment files. The role evaluates office needs, assists in acquiring assets, equipment, and furniture, and develops specification sheets, obtains and screens vendor bids, selects the most appropriate bid, and prepares purchase requests. Responsibilities also include making CalCard purchases using correct charge codes, processing CalCard invoices, and preparing the required monthly CalCard report for the Division of Procurement and Contracts (DPAC) before the 10th of each month.
20%	E	Develops, executes, and administers service and vendor contracts for the Headquarters (HQ) Legal Office and works closely with the Office Manager, HQ Legal Contracts, Accounting, and DPAC on new contracts, contract extensions, and amendments. Contract administration duties include utilizing AMS Advantage, DataLink, LCM system, and other databases to process and monitor contracts, preparing monthly reports on expiring agreements, and recommending improvements to contracting practices such as prioritizing fund utilization, addressing improprieties, refining evaluation criteria, and resolving contract disputes.
10%	E	Serves as the Authorized Telecommunications Representative (ATR) for the division, responsible for carrying out daily telecommunications operations in accordance with the State Telecommunications Management Manual (STMM) and enterprise-wide directives issued by the Chief Agency Telecommunications Representative (CATR). The ATR ensures compliance with Caltrans telecommunications policies and CALNET program requirements by coordinating device activations, service plan changes, troubleshooting, and line suspensions; managing mobile equipment assignments; and submitting required forms for airtime charges and billing changes. The incumbent processes new and upgraded device deployments, supports Intune enrollment and configuration, resolves service or activation issues, and collaborates with the Property Controller to ensure accurate tagging, inventory updates, and ServiceNow record maintenance.
5%	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.

[1]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.

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, PowerPoint, and Teams).

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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 40 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.

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.

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.

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 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

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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

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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