STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

| CLASSIFICATION TITLE | OFFICE/BRANCH/SECTION | |
|---|---|---|
| Analyst II | D3/NR Construction | |
| WORKING TITLE | POSITION NUMBER | REVISION DATE |
| NRC Support Analyst | 927-502-5393-XXX | |

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, District Materials Engineer, the incumbent acts as a service contract manager, plays a pivotal role in facilitating the efficient procurement and financial operations for the West Area Construction Offices. The incumbent's responsibilities encompass leading regular financial audits and reconciling monthly transactions to ensure the accuracy and integrity of records. The incumbent actively manages the CAL-Card, safeguarding against unauthorized use and maintaining compliance of CAL-Card rules and regulations. Through a blend of general procurement processes, Small Purchase Payment Methods, and the CAL-Card program, the NRC Support Analyst ensures that all necessary goods and services are acquired promptly and in alignment with established procedures. The role also involves reviewing and validating invoices for purchases and services, preparing payment documentation, and generating monthly statements to uphold financial transparency. Additionally, for equipment acquisitions valued at $500.00 or more, the Field Office Associate initiates asset tagging to support robust property control and accountability. On as needed basis, the incumbent will provide Contract Administration Support by reviewing and processing various Contract Administration documentation to ensure compliance with current policies and procedures and by helping field construction personnel as required.

## 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 - Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - 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. (Prosperity - Innovation)
- **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 - Integrity)
- **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 - Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity - Equity, People First, Pride)
- **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. (Equity - People First, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Stewardship)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Safety, Employee Excellence - Integrity)

## TYPICAL DUTIES:

| Percentage Essential (E)/Marginal (M)[1] | Job Description |
|---|---|

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| | | |
|---|---|---|
| 50% | E | Act as a service contract manager and subject matter expert for the procurement of services and goods for the West Area Construction Offices. Independently analyzes and evaluates rules and regulations related to various funding sources and determine which funding source is appropriate for purchasing of services and goods. Prepares and monitors multiple, varying contracts. Additionally, tracks quarterly and annual fees paid to outside agencies to ensure compliance and proper financial management. The incumbent is responsible for completing required service contract documentation, including form ADM-0360 (service contract request), form ADM-4040 (scope of work), bidder/proposer lists, bid sheets, and other related paperwork. Maintains communication with facilities, DPAC, and DGS staff throughout the contracting process. Extracts relevant data from sources such as CGI Advantage, infoAdvantage, and Filemaker Pro. Utilizes computer software and programs to create spreadsheets and reports that support contract and procurement decisions. Uses the gathered data to formulate findings and recommendations regarding the most suitable purchasing method, whether through a service contract or CAL-Card. |
| 35% | E | The incumbent is responsible for obtaining and maintaining a CAL-Card in good standing, which includes managing and safeguarding the CAL-Card to prevent unauthorized use and ensure proper stewardship for the West Area Construction Offices. The incumbent will utilize a combination of general procurement processes, the Small Purchase Payment Method, and the CAL-Card program to acquire the necessary goods and services. The work includes reviewing and validating all invoices related to goods and services acquired. After verification, payment documents are prepared for both services rendered and purchases complete, and generating monthly statements of account. Additionally, conduct audits and reconcile monthly transactions and payments to maintain accurate financial records. For any equipment purchased with a value of $ 500.00 and more, the incumbent is responsible for initiating a request to acquire a property control tag to ensure proper asset tracking and management. |
| 10% | E | Maintain and keep up to date the Property Control Inventory database. Accurately enter and submit test results to the Data Interchange for Materials Engineering (DIME). |
| 5% | M | Miscellaneous duties and other assignments within position specifications including maintaining project files, attending meetings, liaison with other branch members and functional units, etc. |

[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

This position does not supervise. However, this position will act as lead in providing contract work records, budget and maintaining contract documentation.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have a thorough knowledge of the Departmental organization and its functional units in order to perform their duties and work under pressure to meet planned and production deadlines. Must have knowledge of Departmental contract policies and procedures. The incumbent must have the ability to analyze situations accurately, and take appropriate and effective action: deal tactfully with the internal stakeholders, contractors, and outside consultants on a sensitive and timely manner. The incumbent must have the working knowledge of mainframes and personal computer software, such as Windows, Word, Excel, PowerPoint, Adobe Acrobat, Falcon DMS, etc. as well as modern office methods, supplies and equipment. Incumbent must also possess excellent organizational skills in order to meet deadlines to ensure timely project delivery and must possess ability to speak and write clearly and effectively.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Must be able to effectively make decisions concerning work in progress and in solving assignment related issues. Work must be performed in an accurate, organized, and timely manner, failure to do so could result in unnecessary delays and/or costs to the Department. The incumbent must be able to set priorities with the work schedule, as poor judgment would hamper work flow resulting in loss of time, work delays and substandard service by the Department.

PUBLIC AND INTERNAL CONTACTS

This position requires continuous written and oral communication with the supervisor, others within the unit, Resident Engineers, other internal units, and external partners as applicable. Incumbent must establish and maintain courteous and cooperative relations with those contacted in the course of work; and provide high quality service. Must adhere to service standards set by the incumbent's unit and provide high quality service to both internal and external customers.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long periods using a keyboard and video display terminal; sustain mental activity for analysis and reasoning. This position may require travel to construction offices and upcoming or current project field sites, travel locally or to other areas of District 1. May include walking on uneven ground, bending, stooping, and kneeling. Incumbent may be exposed

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to construction dust, dirt, noise, inclement weather, and live traffic. Incumbent must have the ability to develop and maintain cooperative working relationships; consider the needs and perspectives of others; respond effectively to changing circumstances; and communicate to foster a team-oriented environment and conduct all work related relationships in a professional manner.

WORK ENVIRONMENT
The incumbent will work in a climate-controlled office under artificial lighting at the materials lab; may require attending meetings or site work at District or local field office. Incumbent is responsible to maintain a safe and organized workstation. The position requires travel locally and on rare occasion to other areas of County or the State. Possession of a valid driver's license is required when operating a state owned or leased vehicle.

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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# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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|---|---|---|
| Analyst I | D3/NR Construction | |
| WORKING TITLE | POSITION NUMBER | REVISION DATE |
| NRC Support Analyst | 927-502-5157-XXX | |

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## GENERAL STATEMENT:

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## 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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| 35% | E | Under the supervision of the Senior Transportation Engineer, support the West Area Construction Offices, the incumbent is responsible for obtaining and maintaining a CAL-Card in good standing, which includes managing and safeguarding the CAL-Card to prevent unauthorized use and ensure proper stewardship. The incumbent will utilize a combination of general procurement processes, the Small Purchase Payment Method, and the CAL-Card program to acquire the necessary goods and services. The work includes reviewing and validating all invoices related to good and services acquired. After verification, payment documents are prepared for both services rendered and purchases complete, and generating monthly statements of account. Additionally, conduct audits and reconcile monthly transactions and payments to maintain accurate financial records. For any equipment purchased with a value of $ 500.00 and more, the incumbent is responsible for initiating a request to acquire a property control tag to ensure proper asset tracking and management. |
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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 |

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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