STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst II	D07/PLANNING/OFC OF REG & MULTIMODAL PLANNING	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Fund Monitor	907-163-5393-003	

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 Chief of the Office of Multimodal System Planning, a Supervising Transportation Planner, the Analyst II performs administrative assistant work for three offices: the Office of Regional Planning and the Office of Multimodal System Planning and Complete Streets. Incumbent performs more responsible, varied, and complex, technical, analytical, staff services assignments such as program evaluation and planning; systems development, budgeting, planning, management, and personnel analysis; and continually provide consultative services to management or others. This is the full journeyman level analyst class.

CORE COMPETENCIES:

As an Associate Governmental Program Analyst, 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. (Cultivate Excellence - Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **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. (Cultivate 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. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Fostering Diversity:** Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Advance Equity and Livability in all Communities - Equity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement)
- **Negotiation:** Negotiates in a manner that results in positive business outcomes, while maintaining strong relations with the other negotiating member. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence - Innovation)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence - Innovation)

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M)[1]	Job Description
30%	E	Prepare and monitor annual budget for the Division of Planning, including Transportation Planning, Regional Planning, and Multi-Modal System Planning. Run monthly, quarterly, and annual labor, OE, and staffing reports. Work with Accounting, Budgets, headquarters, and other Divisions to maintain accurate charges and data detail. Reverse charges that were applied incorrectly. Monitor staffing charges and overtime, and provide monthly reports. Alert and communicate any issues or concerns to supervisors, and work toward successful resolution. Special, ad hoc reports, trending, and analysis may be requested. Represent the Offices as Fund Monitor with Budgets. Monitor the COS allocation for the Offices. Document all processes performed and maintain/update these documents as needed.

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30%	E	Monitor staff and POB versus authorized positions and allocation; maintain current organizational chart; modify / assist with developing and/or updating duty statements for current and proposed positions; assist with writing justifications for new positions or classification changes; originate PARF for all vacant positions; acts as personal liaison for the Office Chiefs. Assists Senior Transportation Planners and Senior Transportation Engineers. Coordinate transfers, temporary employment, out of class, and retirement processes and paperwork. Review, update, and maintain POB, Vacancy Report, PTAS, staffing reports and databases for detail and accuracy. Maintain confidential files including duty statements, employee emergency information, ABM 2011s, and other required forms. Process Travel/Expense requests. Track mandatory training requirements for staff members, and ensure training compliance for staff within the Division. Document all processes performed and maintain/update these documents as needed.
30%	E	Perform duties of Property Liaison for Division. Keep an inventory of all supplies and equipment (IT and non-IT) for both offices. Support annual property reporting to Property Management. Update and maintain the D07 inventory database and/or data warehouses designated for inventory tracking and monitoring. Process paperwork for equipment transfers, and paperwork for any unused equipment that needs to be surveyed out to IT or Property Management. Coordinate with Property Management regarding any loss, theft, or equipment damages. Coordinate with other Division Administrators as a liaison with Property Management. Assist Division with administrative needs in cooperation with other divisional administrators. This includes mail and check distribution, and other functions as necessary. Prepare justifications for non-expendable equipment purchases, research equipment needs, make recommendations to the management team, and prepare yearly non-expendable equipment request. Review all purchase requests from office personnel, assuring availability of funds and submit to the Office Chief for review and approval. Process invoices and payments for the Division. Coordinate and maintain necessary equipment contracts. Create, monitor, coordinate, and update necessary equipment purchase orders and contracts. Represent Division as Telecommunication point of contact (ATR), including update Mobile Provider database with current information, monitor billing, update headquarters for billing changes/updates, update IT software (currently, SNOW) with user details, update user records and property database with mobile data information, replace lost or damaged equipment. Support Division for equipment upgrades. As a Cal-Card holder, this position will be responsible for all activities, reports, documentation, billing, paperwork, and training associated with possession of a Cal-Card. Work with Facilities to coordinate repairs, modifications, alterations, or department moves, relocations, workstation modifications or necessary cleaning. Document all processes performed and maintain/update these documents as needed.
10%	M	Filing, photocopying, office coordinations, and appointment scheduling. Assist Supervisors and Managers with clerical functions, documentation, and research projects (budget, data, staffing, documentation, legal, property, HR, or as described above). Assist with and/or perform backup duties for other AGPA and SSA within Planning Division* during absenses, vacancies, vacations, or when otherwise necessary. (*Planning resources within funds 2010, 2030, 3010, 4000, 4050 and 204010, otherwise known as Transportation Planning/Regional Planning, including the offices of Multi-Modal System Planning, Project & Special Studies, Public Transportation / Local Assistance, or Division of Planning). Share knowledge with other AGPA/SSA for consistency, communication, and learning.

[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 other employees.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Principles and practices of general business management, modern methods of public and business administration including organization, fiscal and personnel management, training, administrative analysis, and budgetary procedures. Must have a good working knowledge of computer applications such as spreadsheets, word processing and database management programs. Requires knowledge of purpose, organization, policies, procedures of other Divisions and offices within the department. Serve as staff on matters concerning budgeting, personnel transactions, and other matters. Interpret and apply rules and procedures. Must have the ability to reason and analyze data to develop, evaluate, and/or implement alternatives to complex problems and formulate solutions. Able to estimate and budget for future needs, cost of personnel, equipment, service, supplies, and space. Able to establish and maintain cooperative working relationships.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Performs responsible and complex administrative work for the function. Incorrect information supplied to Management,

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Resources Management, or Headquarters, could result in improper staffing needs and monetary loss to the District.

PUBLIC AND INTERNAL CONTACTS
Communicates within the Division, with other District functions, and Headquarters.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Employees may be required to sit for long periods of time using a keyboard, and video display terminal. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.
Most of the jobs in the Division require interaction with many people. It is important that employees work with others in a cooperative manner.

WORK ENVIRONMENT
The The incumbent will telework and/or work in a climate controlled office or cubicle under artificial lighting. Extensive computer usage is required. Travel both within and outside the District may be required when attending meetings.

The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Incumbent is expected to be able to report to their worksite with minimal notification if an urgent need arises. The incumbent may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an incumbent's designated Headquarters Location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the incumbent.

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.)

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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