STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst I	District 5 Administration	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Business Services Analyst	905-001-5157-015	10/26/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under supervision of the Chief, Budget Management Branch (Supervisor I), the incumbent is responsible for coordinating the District's light vehicle fleet of 25+ vehicles; processes vehicle requests, coordinates the long-term reservations, handles considerations of electric vehicles, analyzes and assigns vehicles in a manner which maximizes fleet usage; acts as a liaison with Shop 5 to ensure regular maintenance and repairs, and ensures the fleet is in clean working order. Utilizes various on-line analytical tools for the Vehicle Home Storage Permit (VHSP) program and Fleet Optimization Usage Reports (FOUR) to ensure proper reporting and identify equipment utilization patterns that necessitate optimization actions. Processes all incoming and outgoing mail for Caltrans District 5, including twice weekly trips to distribute mail at local offices, processes mail daily for overnight courier pick up.

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.

- **Flexibility and Managing Uncertainty :** Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Safety, Employee Excellence - Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Employee Excellence - Equity, Innovation, 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. (Employee Excellence - Integrity, Pride, 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. (Safety, Employee Excellence - Collaboration, Innovation, Pride, Stewardship)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Employee Excellence - Equity, Integrity, Pride, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Equity, Integrity, 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. (Employee Excellence - Collaboration, Equity, Integrity, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety, Employee Excellence - Equity, Integrity, People First, Pride)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Equity, Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

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40%	E	Manage the District's light fleet of 25+ vehicles by assigning vehicles in a manner which maximizes usage. Analyzes vehicle reservation requests by reviewing usage reports and determining priority for vehicle type and the most appropriate option for the requested need. Respond promptly to reservation requests using various MS Enterprise programs (outlook, excel, forms, etc.) Coordinate and track both short-term and long-term vehicle reservation requests, inform Shop 5 Superintendent of all long-term reservation changes. Analyze and maintain the vehicle maintenance schedule and current mileage of vehicles to compare data against incoming reservation requests and optimizing usage. Ensure all forms are maintained for vehicles, including pre-op/post-op books, maintenance records and accident forms. Liaise with Shop 5 personnel to responsibly manage the automotive fleet of vehicles, ensure timely repair and maintenance; conduct routine inspections of fleet and address concerns. Ensure keys and forms are set out daily for new vehicle reservations. Develop, create, and distribute informational handouts related to the safe operation and upkeep of the District fleet vehicles, ensuring staff is informed of how to operate both gas, hybrid, and electric powered vehicles. Confirm availability, maintenance, and cleanliness of vehicle for each reservation. Track, monitor, analyze, and prepare reports related to fuel usage for all fleet vehicles.
30%	E	Utilize various on-line analytical tools to pull, run, analyze, and manage the Garaging Report for the Vehicle Home Storage Permit (VHSP) program and Fleet Optimization Usage Reports (FOUR). Ensure proper reporting and identify equipment utilization patterns that necessitate optimization actions. Notify Management of potential misuse and coordinate with District staff to ensure underutilized vehicles obtain maximum usage via temporary loans to the motor pool. Coordinate with the District Fleet Optimization Manager to update loaned vehicle information and Shop 5 to ensure preventative maintenance is up to date. Assist with implementing and administering various fleet management policies and practices throughout the District. Responsible for tracking and monitoring of electric vehicle (EV) charging and usage; including keeping a schedule, maintaining EV components for driver safety, and ensuring the vehicles receive regular and proper updates. Research, coordinate, and implement motor pool activities that support the Sustainability framework, including Zero Emission Vehicles (ZEV) charging station policy, procedures, and reporting. Develop informational material and handouts to assist staff in using electric vehicles. Other tasks related to the use of the electric vehicle fleet may be assigned, as required.
25%	E	Process all incoming and outgoing mail for Caltrans District 5; including, processing registered and overnight mail utilizing on-line programs from respective vendors and preparing daily mail for overnight courier pick up. Responsible for two weekly mail runs to three local offices in the San Luis Obispo area and the post office, utilizing a state vehicle. Compare postal costs and ensure most cost-efficient service is used for timely delivery of parcels. Route correspondence and packages to proper field offices and distribute mail into employee mailboxes at the District Office. Answer inquiries from various internal and external stakeholders regarding deliveries and mailing procedures, including shipping and tracking of packages. Maintain correct amounts of essential supplies needed for mail delivery including overnight, postage, and interoffice mail outs. Work with other Districts and HQ to coordinate the logistics of transferring IT equipment, including working with the warehouse to ensure proper freight shipments, evaluating weight and size requirements, and ensuring both sender and recipient are notified throughout the process. Ensure postage machine is maintained and an adequate amount of postage is available. May assist District 5 Budget staff to create, monitor, and analyze maintenance and service contracts using AMS Advantage, and other databases, to ensure adequate funding is available for needs related to the mailroom or motor pool duties.
5%	M	Will oversee, develop, and maintain Employee Vehicle Use Training sessions. Cross training with the District Cashier, another Analyst I, is required for the purpose of providing backup coverage during absences and as workload needs arise. This position requires a valid California driver’s license and requires lifting and moving of packages on/off a cart; up to 50 pounds.

[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 has no supervisory responsibilities.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The incumbent must be able to demonstrate a positive attitude and strong customer service skills to all department and any external clients. Must be able to follow oral and written directions, have good verbal and written communication skills including the ability to spell correctly. Must possess basic computer skills with the ability to use basic word processing and spreadsheets

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and operate various mailing machines. Must be knowledgeable of District policies and have the ability to evaluate situations accurately and take effective action using tact and good judgment. Must possess a valid California driver's license.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Incoming and outgoing mail is time sensitive. Incumbent must use good judgment on how the mail will be dispatched. Appropriate and timely analysis is also necessary to maintain vehicle pool availability. Misuse or underutilization of fleet may result in loss of vehicle availability for District use.

Poor judgment, error, or failure to communicate issues in a timely manner when performing job duties may result in loss of time, money, efficiency, public trust, and would not be in compliance with Stewardship practices related to the usage of state property and funds.

PUBLIC AND INTERNAL CONTACTS
The incumbent will have regular contact with all levels of staff, vendors, contractors, other state agencies, and the public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Must be able to sit and/or stand for long periods of time and perform tasks utilizing a personal computer, mail equipment, and telephone. May be required to move large items from one location to another. Requires frequent bending, stooping and kneeling. Must be able to lift up to 50 pounds. Must be able to organize and prioritize varied documents and tasks. Must have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice. Must be able to develop and maintain cooperative working relationships.

WORK ENVIRONMENT
The incumbent will be required to work within the confines of a shared, climate controlled office under artificial lighting. The incumbent will also be required to walk outdoors, up and down stairs, and travel to other local offices to distribute mail and packages. Incumbent is required to work in the office during core business hours, Monday-Friday.

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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