STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Equipment Materiel Specialist	Division of Equipment/Maintenance & Repair/Shop 4	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Equipment Materiel Specialist	932-024-1552-029	

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

GENERAL STATEMENT:

While working for the Caltrans Division of Equipment (DOE), in an Equipment Shop, the Equipment Materiel Specialist (EMS) receives supervision from the Equipment Materiel Manager I / II, and day-to-day direction from the Senior Equipment Materiel Specialist. Performs Equipment Materiel Operations work concerning the purchasing, inventory, disbursement, shipping and receiving of equipment parts, materiel, related equipment and services for the fabrication, maintenance, repair and disposal of mobile equipment. Incumbent must possess a valid class C driver's license.

CORE COMPETENCIES:

As an Equipment Materiel Specialist, 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 - Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety - Integrity, Stewardship)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Safety - Integrity, 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 - Integrity, Stewardship)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Equity - Equity, Pride, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - People First)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Employee Excellence - Collaboration)
- **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. (Safety - Integrity, Stewardship)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Safety - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

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40%	E	Responsible for the purchasing of equipment parts and materiels for the respective shop by following the purchasing regulations as outlined in the Materiel Services Procedure Handbook. Determines proper cost coding to enter on purchase documents. Determines the proper mode of purchase using Purchase Authority Purchase Order (PAPO) or Calcard. Implements legal purchases utilizing existing Contracts, California Multiple Award Schedule, State Price Schedule, Prison Industry Authority, Master Rental Master Service Agreements and other information. Uses the vendor price file for all items stocked and purchased in quantity, to ensure we are getting the best quality and price on the items purchased. Prepares specifications for materiel and services; solicits bids, negotiate with vendors on price, delivery and quality. Sees all parts and materiel ordered are delivered promptly. Helps the Division of Equipment meet the goals of spending 25% with Certified Small Business Enterprises and 3% with Disabled Veteran Enterprises. Also responsible for processing all purchase requests through the Enterprise Resource Planning Financial Infrastructure (E-FIS).
20%	E	Processes PAPO's in a timely manner to comply with the Prompt Payment Act. Performs monthly reconciliation of the Calcard purchases and submits purchasing documents to the Division of Accounting by the 8th day of each calendar month. Ensures all invoice-billing problems are brought to a quick resolve. Brings timely resolve to all disputed charges, and to immediately report any misuse or fraudulent use of your cal-card, and to keep all cardholder information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Ensures that all credits and warranty reimbursements are received.
15%	E	Maintains various materials and supply inventories in the shop parts room, outside storage areas, warehouse, field shop locations and maintenance yards, and ensures adequate inventory is on hand. Determines the timeliness of materiel needs and recommends substitutions. Rotates inventories on a first in/ first out basis. Ensures proper stock security measures are taken. Maintains proper stock levels in the miscellaneous small parts areas located in the shop, parts room and field mechanic locations. Performs periodic physical inventories, spot check high dollar items at the Main Shop and completes check at the Field Mechanic locations. Makes inspection trips to field locations and reports findings using the Field Location review form to keep on file. Maintains proper stock organization in bins, shelving and pallet racks. Ensures all stock is labeled and has either a labeled bin box or the shelf area clearly marked. Periodically re organizes stock for proper location and accessibility. Reconciles daily Fleet Management reports against receiving and disbursement documents for accuracy. Responsible for the keypunching and coordinating the input of daily transactions via the computer terminal including direct issue parts, commercial repairs shop stock receipts and disbursements. Reviews stock reports for items to add or items that are now surplus to our needs or have become obsolete. Arranges for the return or disposal of surplus or obsolete parts and supplies. Removes items from inventory and prepare Property Survey Report noting the reason for disposal and the method being used. Responsible for the legal disposal of all hazardous waste material and scrap. Using the appropriate database, assigns property tag to all new non-expendable equipment. Assists with the conduction of yearly computer and non-expendable inventory.
15%	E	Receives mobile equipment from Headquarters Shop and new vehicle direct deliveries from vendors. Works with vendors to correct delivery problems. Checks units against equipment specifications to insure Department of Motor Vehicles documents are correct. Prepares the Caltrans Equipment Identification form, DME76, "check sheets" on units received and route copies to proper departments. Periodically reviews stock and direct issues, on-order files to ensure prompt vendor performance. Contact vendors on late deliveries, and report all late shipments to your supervisor or lead-worker. Ensures shipments are examined for quantity and quality of merchandise being received; receiving problems are resolved and receiving data is entered into computer system; items are put away and stored properly; materiels are removed from stock and prepared for shipment; bills of lading are prepared properly and hazardous materials are properly handled and shipped.
10%	M	Maintains PAPO logs and Cal-card files for all cardholders and hazardous waste document files including items returned to the shop for consolidation purposes. Ensures all documents are kept on file for the required file retention period set by the Caltrans. Also ensures required vendor forms are on file when using the pre-qualified vendor justification. These include The Drug Free Workplace Certification, The Vendor Data Record, and The Vendor Repair Agreement. Responsible for maintaining the cleanliness of work areas as required. This may include dusting, cleaning, mopping and sweeping.

[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.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
None.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Knowledge of: inventory, stocking, shipping, receiving and disposal procedures, as outlined in the Materiel Operations Handbook; automotive, truck, and heavy equipment parts, accessories, tools and sources of supply.
The ability to: learn legal procurement policies, procedures, and limitations as outlined in the materiel operations handbook and in the Department of General Services delegation that is granted to the Division of Equipment, and using the proper cost coding; learn automotive, truck, and heavy equipment parts, accessories, tools and sources of supply; understand basic computer operations with the ability to operate mainframe and PC based computers for input and retrieval of information; follow the procedures as outlined in the Fleet Anywhere / Management manual; communicate clearly; exercise patience; handle multiple priorities.
May be subject to working overtime and variable work shifts. Must be able to work during emergency or declared emergency situations.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Failure to properly purchase, receive and disburse parts, supplies, components and equipment would drastically hinder the shop's operation, increase equipment downtime and add to overall cost of operation. Violations of purchasing regulations could also result in the loss of equipment's purchasing delegation.
This position has been designated as safety sensitive in accordance with Department of Personnel Administration Rules 599.960 and 599.961. Use of alcohol and/or drugs that impede the employee's ability to perform his or her duties safely and effectively could clearly endanger the health and safety of others, resulting in injury and or death.

PUBLIC AND INTERNAL CONTACTS
Extensive contact with other Division of Equipment shop personnel and field mechanics, Department district employees and various vendors.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Ability to stand and walk on concrete flooring all day, frequently stooping, bending and kneeling; sit for prolonged periods of time; lift and move equipment parts and boxes weighing up to 50 pounds frequently, and up to 75 pounds occasionally; reach overhead to retrieve or place objects weighing up to 35 pounds; climb stairs carrying objects weighing up to 50 pounds on occasionally; operate forklifts and hand operated materiel-handling devices.
Possession of a class "C" drivers license and be able to travel to distant locations in inclement weather.
Will be required to wear safety equipment including eye protection (safety glasses), ear plugs, safety vest, and hard hat. Must be able to wear protective clothing as required and furnished by the Division of Equipment.

WORK ENVIRONMENT
Incumbent will work primarily in the shop parts department adjacent to the shop. At times, it will be necessary to work in outside storage areas, warehouse, distant field mechanic locations, or highway maintenance warehouses. Incumbent may / will be exposed to dirt, noise, uneven surfaces, hazardous materials and various temperatures. May be subject to travel, rotation, changes of shift, work hours and workdays, and mandatory overtime. Must be able to work during emergency or declared emergency situations.

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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)	
SUPERVISOR (Signature)	DATE

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