STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

| CLASSIFICATION TITLE | OFFICE/BRANCH/SECTION | |
|---|---|---|
| Equipment Materiel Manager I | Division of Equipment/Maintenance & Repair/Shop 4 | |
| WORKING TITLE | POSITION NUMBER | REVISION DATE |
| Equipment Materiel Manager I | 932-024-1540-925 | |

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

## GENERAL STATEMENT:

Within the Division of Equipment and under the direction of a Highway Equipment Superintendent I, II, III or Equipment Materiel Manager II or III, the Equipment Materiel Manager I, supervises a staff engaged in 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. Possession of valid driver's license is required when operating a state owned or leased vehicle.

## CORE COMPETENCIES:

As an Equipment Materiel Manager 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 - Collaboration, Integrity, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety - Collaboration, 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 - Collaboration, 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 - Collaboration, 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 - Collaboration, Integrity, Pride, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Employee Excellence - Collaboration, Integrity, Stewardship)
- **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, Integrity, Pride, Stewardship)
- **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 - Collaboration, 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 - Collaboration, Integrity, Pride, Stewardship)

## TYPICAL DUTIES:

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

**Americans with Disabilities Act (ADA) Notice**: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

| | | |
|---|---|---|
| 35% | E | Audits and is responsible for all purchases made by Equipment Shop Employees. Ensures proper cost coding on purchase documents. Must be familiar with all purchasing regulation outlined in the Materiel Operations Handbook. Must determine the proper mode of purchase using Contract Purchase Authority Purchase Order (PAPO) or Cal-Card. Must have thorough knowledge of existing Contracts, California Multiple Award Schedules, State Price Schedule, Prison Industry Authority, Master Rental Master Service Agreements and information to implement legal purchases. Must process PAPO's in a timely manner to comply with the Prompt Payment Act. Must perform monthly reconciliation of the Cal-Card program in a prompt manner and have purchasing documents into Accounting by the 8th day of each calendar month. Must oversee all invoice-billing problems to bring them to a quick resolve. Must oversee all Cal-Card Program to ensure the proper use of the card, to ensure timely resolve to all disputed charges, and to immediately report any misuse or fraudulent use of a cardholders card, and to keep all cardholder information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Ensure that all credits and warranty reimbursements are received. Maintain a vendor price file for all items stocked and purchased in quantity, and update annually. Prepare specifications for materiel and services, solicits bids, negotiate with vendors on price, delivery, and quality. Responsible for keeping an up to date record of sources for parts, supplies, and services required by the shop. Ensure that all parts purchased are of good quality and are promptly delivered. |
| 30% | E | Review and approve all purchasing documents. Trains shop supervisors and field mechanics on proper purchasing methods and the proper manner filling out purchasing documents. Give guidance and train subordinate Equipment Materiel Specialists in procurement and parts department procedures. Develop and train staff by means of on-the-job training and individual development plans. Responsible for the safe operation of the parts department and employees. Host semi-monthly tailgate safety meetings covering safety and best management practice related items. Attend quarterly safety meetings and monthly staff meetings. Work closely with shop supervisors, field mechanics, and vendors. Initiate and administer formal and informal service contracts. Administer the safety eyewear program. Help manage materiel recycle programs. |
| 25% | E | Maintain various materials and supply inventories in the shop parts room, outside storage areas, warehouse, field shop locations, and maintenance yards, and ensuring that there is an adequate inventory on hand. Determine the timeliness of materiel needs and recommend substitutions. Rotate inventories on a first in/first out basis. Ensure proper stock security measures are taken. Maintain proper stock levels in the miscellaneous small parts areas located in the shop, parts room, and field mechanic locations. Perform periodic physical inventories, spot check high dollar items at the Main Shop, and complete check at the Field Mechanic locations. Make inspection trips to field locations, report your findings on the Field Location review form, and keep it on file. Maintain proper stock organization in bins, shelving, and pallet racks. Make sure all stock is labeled and have either a labeled bin box or the shelf area is clearly marked. Periodically reorganize stock for proper location and accessibility. Reconcile daily Fleet Management reports against receiving and disbursement documents for accuracy. Responsible for keypunching and coordinating the input of daily transactions via the computer terminal, including direct issue parts, commercial repairs shop stock receipts, and disbursements. Review stock reports for items to add or items that are surplus to our needs or have become obsolete. Arrange for the return or disposal of surplus / obsolete parts and supplies. Remove items from inventory and prepare Property Survey Reports noting the reason for disposal and the method being used. Responsible for the legal disposal of all hazardous waste material and scrap. Log in and assign property tag to all new non-expendable equipment. Help conduct yearly computer and non-expendable inventory. |
| 5% | E | Oversee the receiving of mobile equipment from Headquarters Shop and direct deliveries from vendors. Work with vendors to correct delivery problems. Check units against equipment specifications to ensure Department of Motor Vehicle documents are correct. Prepare Caltrans Equipment Identification (DME76) "check sheets" on units received and route copies to proper departments. Periodically review stock and direct issue, on-order files to ensure prompt vendor performance. Contact vendors on late deliveries. Make sure shipments are examined for quantity and quality of merchandise being received. Make sure receiving problems are resolved and receiving data is entered into computer system. Make sure items are put away and stored properly. See that materiel is removed from stock and prepared for shipment. Make sure bills of lading are prepared properly and hazardous materials are properly handled and shipped. |

**Americans with Disabilities Act (ADA) Notice**: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

| | | |
|---|---|---|
| 5% | M | Maintain PAPO logs and Cal-Card files for all cardholders. Maintain hazardous waste document files including items returned to the shop for consolidation purposes. Ensure that all documents are kept on file for the required file retention period set by the Department. Ensure that required vendor forms are on file: The Drug Free Workplace Certification, The Vendor Data Record, and The Vendor Repair Agreement. Help maintain the Vendor Repair Agreement Database. |

[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

Supervises Equipment Materiel staff. Plan, develop, and monitor staff. Take proper corrective action. Functional Supervision over field mechanics in matters pertaining to stocking and purchasing. Ensure a safe work area.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

A thorough knowledge of: 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, inventory, stocking, shipping, receiving, and disposal procedures, automotive, truck, and heavy equipment parts, accessories, tools, and sources of supply.

Understand basic computer operations with the ability to operate PC based computers for input and retrieval of information. Follow the procedures as outlined in the Fleet Management manual.

Ability to manage and supervise people, communicate clearly, exercise patience, write letters, prepare written reports and conduct meetings within your department, handle multiple priorities, and 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 shop supervisors, field mechanics, district employees, and vendors.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Ability to: Walk on concrete flooring, stoop, bend, and kneel on occasion if required; sit for prolonged periods of time; lift and move equipment parts and boxes weighing up to 75 pounds on occasion if required; reach overhead to retrieve or place objects weighing up to 35 pounds on occasion if required; climb stairs carrying objects weighing up to 50 pounds on occasion if required; operate forklifts and hand operated material-handling devices.

Will be required to wear safety equipment including eye protection (safety glasses), ear plugs, safety vest, and a hard hat. Must be able to wear protective clothing as required and furnished by the Division of Equipment.

WORK ENVIRONMENT

The Equipment Materiel Manager I will work primarily in the shop parts department adjacent to the shop. Primarily, time in this position will be spent inside an office environment. At times, it will be necessary to work in outside storage areas, warehouse, distant field mechanic locations, or highway maintenance warehouses. Must be able to work in these areas in inclement weather, which may include severe cold or heat. At times it may be necessary to assist with the daily operation of the parts department, which may include any or all of the duties listed. At times it will be necessary to make trips to Field Mechanic locations to review their inventory and stock areas.

**Americans with Disabilities Act (ADA) Notice**: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

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 |

**Americans with Disabilities Act (ADA) Notice**: This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.