

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Staff Services Analyst (Gen)	OFFICE/BRANCH/SECTION D2/Planning and Local Assistance	
WORKING TITLE DPLA Support Staff	POSITION NUMBER 902-800-5157	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the general direction of the Advance Planning branch chief, a Senior Transportation Engineer, the incumbent with guidance will provide entry level support to the District's planning units in a broad range of analytical and support activities in the initiation, tracking, and delivery of the Division of Planning and Local Assistance (DPLA) Units' data, reports, documents, and other work including, but not limited to, Project Initiation Documents (PIDs), Minor B projects, and System Planning, Regional Planning, Climate Change Adaptation, Local Assistance and Complete Streets deliverables. Tasks include coordinating, monitoring, and analyzing milestones and resources and cross-checking project data across different data sources to ensure accuracy and consistency among the data sources. Under guidance, the incumbent performs project encumbrance adjustments and develops and maintains detailed reports specific to program, project, and personnel allocations and expense. Under guidance, the incumbent is responsible for the DPLA annual Personal Service dollars (PS) and Operating Expenses (OE) budgets and provides expert management consultations to senior staff and the Deputy Director of DPLA on trends, concerns, and suggested strategies. Under guidance, the incumbent will develop, maintain, and manage the DPLA equipment asset inventory. Under guidance, the incumbent will act as the administrative liaison to all DPLA offices to include monthly, quarterly, and annual budget review and meetings, division equipment asset inventory and purchasing, and support associated planning functions as needed. Under guidance, the incumbent will support and assist with planning and logistics for DPLA public engagement activities.

CORE COMPETENCIES:

As a Staff Services Analyst (Gen), 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (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. (Safety First - Innovation)
- **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. (Strengthen Stewardship and Drive Efficiency - 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. (Cultivate Excellence - Engagement)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Cultivate Excellence - Equity)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Enhance and Connect the Multimodal Transportation Network - Integrity)
- **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. (Lead Climate Action - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Advance Equity and Livability in all Communities - Pride)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence - Innovation)

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TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
30%	E	Under guidance, the incumbent will manage and maintain the Units' project-tracking databases. Develop new systems or modify existing database systems as needs arise. Support Management in acquiring project related data and identifying programming issues. Under guidance, track, review, analyze, and evaluate project data; research and respond to project schedule adjustments and resource requests. Request Project Engineers to update PID milestones, engineer cost estimates, and other relevant project metrics in database. Monitor PID and Minor project development tasks and completion dates and adjust completion dates when needed. Develop and maintain the PID workplan. Review various documents for grammar, spelling, and punctuation. Enter summarized data into the Project Resource and Schedule Management (PRSM) database, update projects on the workplan, and respond to Caltrans Headquarters (HQ) comments on PID workplan. Generate reports as needed for District use.
25%	E	Under guidance, develop and track allocations between Planning and other District 2 Divisions, North Region, and the Division of Engineering Services (DES). Manage and maintain Planning units' resource allocation tracking system, with supervisor inputs. Under guidance, monitor actual support costs against planned costs, retrieve project expenditure information from Info Advantage to track prior, current, and total expenditures. Track funding by State Highway Operation and Protection Program (SHOPP) code and project costs. Under guidance, monitor and investigate current and historical cross-allocation data and compile findings. Independently forecast expenditures and balances. Prepare monthly and quarterly expenditure analysis reports and other fiscal documents. Present expected needs, shortfalls, inaccuracies and potential remedies and courses of action to senior staff and the Deputy District Director. Responsible for notifying other divisions of project budget inconsistencies, such as incorrect charging, charges where no allocation exists, and overcharging issues. Under guidance, resolve discrepancies, including negotiating the re-distribution of dollars. Evaluate and analyze past, present, and future expenditures and encumbrances. Prepare and process Allocation Change Requests (ACR's) as necessary.
20%	E	Under guidance, initiate projects for time charging. Set up and track Transportation Planning Scoping Information Sheets and Project Initiation Proposals. Request and track legal descriptions, Project Request Forms, and Expenditure Authorization (EA) requests. Submit cost accounting modifications for approval and approve projects in Advantage. Track project as project management builds project into PRSM. Track when DPLA Units' projects are open for charging and when they close.
20%	M	Coordinate DPLA's supply, name plate, and business card ordering and perform equipment inventory. Determine needs and initiate purchase and service documents to insure conformance with budgetary capacity. Approve DPLA procurement request purchases. Monitor expenditures against encumbered documents. Maintain organizational charts and position control for DPLA. Schedule meetings and interviews and take notes at meetings.
5%	M	Assist in public engagement activities related to development of PIDs, Transportation Concept Reports, Feasibility Studies, Active Transportation Plans, and other DPLA products.

¹ESSENTIAL 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 will have no supervision or guidance exercised over others.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must be highly motivated, possess organizational skills, and technical analytical skills. Must be skillful in performing numerical and statistical calculations to provide useful information. Uses sound judgment to generate and evaluate alternatives and recommend solutions. Must have the ability to initiate tasks with little or no instruction based on project needs. Within the confines of applicable laws, rules, policies, and procedures; uses imagination and resources to develop new insights or methods where current methods and processes are insufficient to accomplish desired outcomes. Must be able to communicate to individuals and groups effectively; have the ability to work towards an agreement, negotiating to find mutually acceptable solutions to issues. Must use tact and judgment. Must be proficient with a personal computer and possess experience with or technical ability to learn various software products independently such as: Microsoft Word, Excel, Outlook, Teams, Project, and Access. Must be proficient in accessing information from departmental computer programs or possess the technical ability to learn such programs as PRSM, EFIS, INFO ADVANTAGE, and the use of the Internet and Intranet. Requires knowledge of

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Principles and practices of business management; modern methods of public administration, fiscal management, personnel management, training, administrative analysis and budgetary procedures.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Inaccuracies in analysis may delay projects, increase cost, and result in a less than satisfactory product. Incorrect information supplied to management, DLA, local agencies or FHWA could result in monetary loss and impaired local project delivery. Damage to relationships with internal and external partners may result.

PUBLIC AND INTERNAL CONTACTS

Under guidance, incumbent will have regular contact with Program/Project Management, Project Control, Asset Management, Advance Planning staff and Seniors, District Planning Division staff and Seniors, Office of Project Planning in HQ, and Accounting. Has frequent contact with state, county, city and other local agencies on transportation project financing and administrative matters. Contact is by telephone, electronic mail, and in person. Supports the DPLA team at various meetings involving local governments and allied agencies.

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. Must be able to develop and maintain cooperative and professional working relationships.

WORK ENVIRONMENT

While at the base of their operation, incumbent will work in a climate-controlled office under artificial lighting. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Incumbent may be required to travel in state, but the travel is not frequent. May occasionally attend off-site meetings within the State where climate and accessibility are uncertain.

TELEWORK - This position may be required to telework from home in addition to office work at an assigned location. The amount and availability of telework and/or office work will be determined by the Department based on the functions of each position.

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
