

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Staff Services Analyst (Gen)	OFFICE/BRANCH/SECTION District 7/Program and Project Management/PMSU	
WORKING TITLE Assistant Project Manager	POSITION NUMBER 907-101-5157-XXX	REVISION DATE 03/28/2024

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 supervision of the PMSU Unit Manager, a Staff Service Manager I (SSM I), the Staff Services Analyst (General) (SSA) assists in the development, implementation and maintenance of project scheduling and cost control as the Assistant Project Manager (APM). This process requires use of software tools to facilitate project development, project delivery and efficient utilization of resources. Provide project status beginning with the Project Initiation Document (PID) through the completion of the Construction Contract and the project Closeout. Duties include, but not limited to exercise good judgment to provide necessary support to the Project Development Team (PDT), write correspondence and prepare reports, work closely with the Project Manager (PM) and District PDT members to ensure project delivery is on time, within budget, and with quality. The incumbent must also be able to manage multiple projects.

**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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence - Innovation, Integrity)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity, Pride)
- **Conflict Management**: Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Teamwork and Collaboration**: Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Computer literacy and application**: Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Innovation)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	

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40%	E	Coordinates with the Project Manager to develop, analyze, and interpret project data such as costs and schedules or resource allocations to identify possible conditions that may jeopardize project delivery and provide assistance for necessary actions. Maintains Quality Control and Quality Assurance throughout Project Initiation Document (PID) through the completion of the Construction Contract and the project Closeout. Assists the PM to manage project scope, schedules, and costs for both project capital and support cost estimates, and providing updates. Provides detailed resource analysis of each project for Estimates to Completion (ETC) and Estimate at Completion (EAC) to the PM and the PDT. Participates with the PM and the PDT for all phases in review, analysis, and evaluation of expenditure data; recommends allocation adjustments to the team; research and respond to the project resource requests, incorrect charging practices and direct or re-direct resources to accomplish project delivery; resolve conflict by identifying project concerns and issues in a timely manner, managing them and/or elevating if unable to resolve directly. Uses software tools to facilitate project development and delivery, efficient utilization of resources, and develop and provide status for project workplans, such as Project Resource and Schedule Management (PRSM).
25%	E	Assist the Project Manager in coordinating Project Management activities with functional Units; coordinates and attends PDT and other project meetings. Assist with the preparation of meeting minutes and notes. Schedule meetings with the PDT and stakeholders to identify project solutions and features that addresses the context and constraints of the project. Draft agendas, document meeting notes and disseminate information with the PDT.
20%	E	With the PM's guidance, initiate and monitor project processes, from approval through completion. Draft, organize and process Project Management documents (including but not limited to Capital Outlay Support (COS) allocations, Time Extensions, Project Change Requests, Fund Requests, G-12 Requests, Final Vouchers) and distribute them to functional units.
10%	E	Assist with researching, gathering, and analyzing the project information. Prepare and/or coordinate the production of special statistical reports, charts, or graphs in support of the Programming and Project Management Division.
5%	M	Support the PM with updating consultant expenditures in PRSM accordingly, and monitoring PM Audit Reports.

<sup>1</sup>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 is non-supervisory.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of Caltrans' organization, departmental policies and procedures, the project development process, programming process, and project management concepts. The ability to effectively communicate orally and in writing with people at all levels of HQ's Management, District, Region, and external groups and must be able to apply and communicate this knowledge effectively on a consistent basis. Must have an understanding of the Department's requirements to deliver projects on schedule and within budget. This understanding must include a sound technical knowledge of the requirements of other functional units involved in the project development process.

Incumbent must also have the ability to plan and organize work, and must work effectively and efficiently with others towards a common goal of project delivery within scope, cost, and schedule. Have the ability to analyze information for appropriate charging scheduling and scope. Have knowledge of the entire project delivery process including the required interfacing with local agencies and the public and must possess the ability to anticipate technical issues and potential concerns with each project. Ability to analyze and interpret allocation and expenditure documents and be able to extract resource information from the capital project work plans as well as from expenditure reports. Have the ability to effectively use PC-based software programs for presentation or database purposes. A working knowledge of PRSM and OWB software programs. Experience extracting, evaluating, and analyzing large quantities of data from various sources. Strong analytical skills and experience to evaluate existing processes and recommend process improvements.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

The incumbent is responsible for exercising a wide degree of initiative in carrying out duties. Consideration of all input is crucial to reaching conclusions and taking appropriate action when making project delivery issues. Incumbent must be able to anticipate problems and identify issues that may affect proposed scope, project delivery and/or cost including capital outlay support costs.

**ADA Notice**

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Errors, poor judgment, or failure to recognize and communicate critical issues could result in missed deadlines, misuse of resource allocations, delay or lack of project delivery, loss of programmable funds, and damage to the District's working relationship with our external stakeholders.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent may attend public meetings and work with internal team members and external agencies. Professional attitude is a requirement.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent will be required to sit for long periods of time using a keyboard and video display terminal. Must have the ability to multi-task and adapt to changes in priorities and to complete tasks with short notice. Must be able to communicate effectively and maintain a calm and professional demeanor in stressful situations.

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### WORK ENVIRONMENT

While at the base of operation, employee works in a climate-controlled office under natural and artificial lighting. Minimal travel is required. May need to attend field meeting and external meetings as requested.

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This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee'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 selected candidate.

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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.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE

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