

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Staff Services Analyst (Gen)	OFFICE/BRANCH/SECTION District 7/Planning/Local Assistance	
WORKING TITLE Local Assistance Office Analyst	POSITION NUMBER 907-152-5157-009	REVISION DATE 12/28/2023

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 Office Chief, the Staff Services Analyst performs and is responsible for a variety of administrative duties for the Office of Planning - Local Assistance. The Staff Service Analyst (SSA) is expected to consistently exercise a high degree of initiative, independence and originality in performing assigned tasks and must work with various staff members in completing different tasks. It is expected that this position will handle sensitive and confidential information. Good judgment and the ability to communicate effectively is of primary importance at this level. The duties include the following:

**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.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **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, Equity, Innovation, Integrity, Pride)
- **Fostering Diversity:** Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - 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 - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)

**TYPICAL DUTIES:**

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

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40%	E	Budget: Assist Associate Governmental Program Analyst (AGPA) with the budget including tracking use of operating expense and labor hours and dollars for the Planning - Local Assistance program. Extracts monthly, daily or as required reports from Caltrans systems, Info Advantage/Enterprise Financial Infrastructure (E-FIS). Prepares Monthly Expenditure Reports, using Microsoft software: Excel and Word. Provide assistance with position control, filling vacancies, maintaining organizational charts and the preparation of Personnel Action Request Forms (PARF). Provide Fund Monitor backup.
30%	E	Office Management: Responsible for managing contracts, supplier negotiation, negotiating contract terms and conditions, supplier management and collaboration with internal divisions and external vendors and suppliers. Serve as the office expert in contracting using the various contracting methods as outlines in our Department's Procurement and Contract policies and procedures and the State Administrative Manual for contracts such as: Purchase Orders, Revolving Fund Requests, Requests for Proposals, Requisition Documents (RQS), Service Contract Agreements (dollars), California Multiple Award Schedules (CMAS), Western States Contracting Alliance (WSCA), Statewide Contracts (SC), California Strategic Sourcing Initiative (CSSI), Master Agreements (MA), and obtain bids from various vendors for emergency purchases. Administer large, long term contracts for copiers, office equipment, communication and technology. Participate, promote and provide support for initiatives such as Small Business, Disabled, Veteran, Minority and Women owned businesses.
15%	E	Expense Monitoring: Research feasibility for office supplies and service contracts by preparing comparison reports that analyze where and how purchases will impact our business needs and operations. Identify logistical and other business-related problems and solutions. Will produce district comparison reports for management containing comprehensive and detailed information (why, how, what, where, how much, etc...). Will analyze and monitor allocations and expenditures in the Planning -Local Assistance unit. Prepare and initiate purchase requests using Info Advantage/EFIS. Review and verify invoices for accuracy and prepare appropriate documentation to request payment. Correct erroneous charges that may occur from processing of invoices. Such requests may come from Headquarters and other Divisions. Recommend and implement approved to reduce future coding errors by submitting Expenditure Adjustment Report (EAR) to Headquarters Accounting.
10%	E	Agency Telecommunications Representative (ATR) - Serves as the ATR for the Division maintains and manages all telecommunication (telecom) devices for the Planning units. Assigns and provides cell phones to the Planning staff. Maintains accurate inventory of devices in the Division's database. Responds to requests or inquiries from District 7 or Headquarters (HQ) Telecom. Prepares and submits documents to initiate, deactivate or transfer project coding. Reconcile equipment inventory documentation. Complies purchase requests to order telecommunications products and services. Coordinates device upgrades, services, activation and deactivation.
5%	M	Process Travel Expense Claims (TEC) expenses submitted by office staff, distribute payroll checks and mail correspondence. Maintaining the inventory list, scheduling preventive maintenance, identifying equipment problems and arranging for service.

<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**

None

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

The incumbent must have the knowledge of principles, practices and trends of public and business administration, management and supportive staff services such as budgeting, personnel and management analysis and governmental functions and organization. The incumbent must be able to work independently and effectively coordinate with various levels of management and staff, to communicate effectively orally and in writing and also build and maintain good cooperative working relationships.

The incumbent must be able to reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas and gain and maintain the confidence and cooperation of those contacted during the course of work.

**ADA Notice**

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent's error in judgment and/or poor decisions could result in loss of time and inconvenience to the Offices or possibly lead to legal action against the Department. The incumbent is responsible for the delivery of assignments within the scope, schedule, budget and acceptable standard, Errors could also result in a loss of credibility with agencies and others with which the Department interacts.

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### PUBLIC AND INTERNAL CONTACTS

Frequent contact is required in person, in writing and by telephone within the Division of Planning and with other District 7 functions and Headquarters.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal.

Must grasp the essence of new information and disseminate and incorporate that information appropriately.

Must have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice.

Must be able to organize and prioritize large volumes of varied documents.

Must be able to concentrate in order to review and create documents and meet strict deadlines at all times.

Must be able to work cooperatively with Department's employees.

Ability to resolve emotionally charged issues reasonably and diplomatically.

Must deal effectively with pressure; maintain focus and intensity yet remain optimistic and persistent, even under adversity.

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### WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning or with periodic energy saving power outage rotations, the building's temperature and lighting may fluctuate.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' 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. Employees may be required to conduct business travel on behalf of the Department or commute to the assigned Headquarters location. Business travel reimbursements consider an employee's designated Headquarters location, primary residence and may be subject to California Department of Human Resources regulations or applicable bargaining unit contract provisions. All commute expenses to the Headquarters location will be the responsibility of the employee.

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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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