

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Associate Governmental Program Analyst	OFFICE/BRANCH/SECTION District 11/PPM/Consultant Services Unit	
WORKING TITLE Associate Contract Analyst (ACA)	POSITION NUMBER 911-100-5393-041	REVISION DATE 10/16/2024

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 direction of the Chief, Consultant Services Unit (CSU), a Staff Services Manager I, the Associate Governmental Program Analyst serves as the Associate Contract Analyst (ACA) on multiple Architectural and Engineering (A&E) contracts. The ACA coordinates with Contract Managers and other in-house staff in securing and maintaining consultant services contracts for various functions performed by Caltrans District 11.

CORE COMPETENCIES:

As an Associate Governmental Program Analyst, 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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, 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. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - 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. (Safety First, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, 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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation)
- **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. (Safety First, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Innovation, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety First, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Innovation, Integrity)
- **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, Lead Climate Action - Engagement, Innovation, Integrity, Pride)

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TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
30%	E	Coordinates with the CSU Chief and staff from other divisions to identify specific services to be provided by consultant contracts. Analyzes and evaluates contract procurement regulations and the scope of work requested by Task Order Managers to determine the appropriate contract type and method of payment. Evaluates and makes recommendations concerning the appropriateness of contracting consulting services for Capital Outlay Support (COS) work efforts within District 11. Provides complete fiscal funding and expenditure data for consultant contracts. In coordination with the Contract Manager, prepares and/or reviews documents required for obtaining A&E consultation services. This includes Fact Sheets, Requests for Service Contracts (Form 360's) advertisements, Requests for Qualifications, Requests for Proposals, and other A&E contract documents. Processes, distributes, and/or tracks and files executed Task Orders, personnel requests from consultants, Contract Performance Evaluations, and other related documents in conformance with current State and Federal laws and regulations, and current Agency and Departmental policies and procedures. Coordinates and acts as the liaison between District 11 Contract Managers and the Division of Procurement and Contracts (DPAC) during the contract preparation and selection process and assists in securing contract amendments as needed. Notifies DPAC staff of any contract issues and resolve any disputes as they arise. Works closely with the District to ensure allocation funding is secure. Ensures that the consultant contracts stay on time and within budget and ensures compliance. Implements pre-award audit recommendations, if applicable. Coordinate with the Division of Audits in the pre and post-award consultant auditing process. Assists in the completion of the consultant evaluation and disencumber unused funds.
30%	E	Works with Contract Managers in the accurate development of consultant task order documents and amendments by evaluating task order scopes of services, reports, meetings, periods of performance, schedules, costs, and deliverables. Verifies consultant resources requested are appropriately entered in Project Resourcing and Schedule Management (PRSM) system according to the task Work Breakdown Structure (WBS). Evaluates the contract and active project phase to ensure there is sufficient financial capacity for the task order request. Tracks, monitors, and reports the consultant's use of Disabled Veteran Business Enterprises (DVBE)/ Disadvantaged Business Enterprise (DBE) subcontractors and/or suppliers. Enter executed task orders into the Contract Management System (CMS) and Advantage Management System (AMS). Monitors and forecasts task order expenditures.
15%	E	Acts as point of contact and facilitator for Caltrans Contract Managers, Task Order Managers, consultants, and District 11 Budgets staff to ensure invoice revisions and payments are completed in a timely manner and are consistent with current State and Federal laws and regulations. Reviews and analyzes invoices for completeness, accuracy, consistency, and conformity to Contract Cost Proposals, approved personnel request forms, executed Task Order terms, conditions, and budget provisions. Validates invoices against authorized encumbrances to ensure compliance with Caltrans, contract, and State requirements. Coordinate corrective actions with the consultant Contract Managers, Task Order Managers, and the Chief as required to ensure conformance. Reviews task order budgets, allocations and encumbrance reports from automated sources by contract and fund source to ensure availability of funds to pay for invoices that are being processed. Takes appropriate action to ensure allocation, encumbrance, and task order budget balances are consistent with projected task order expenditures. Works with District Budgets office to obtain fund certification and allow budgets time to process final approval in AMS for 232, 332, and 832 encumbrances and expenditures to ensure we stay within our allocation. Inputs invoice data into tracking databases. Prepares invoice transmittal packages and submit to the Task Order Manager for final review and approval. Submits invoices to Headquarters (HQ) Accounts Payable for payment in a timely manner.
15%	E	Prepares and submits various financial reports to the Chief, Contract Managers, and District 11 Budgets office that detail current and projected contract allocations, payments, and other pertinent data necessary to administer the consultant contracts. Responsible for analyzing potential problems and informing the Branch Chief, Contract Managers, and consultants of any issues. Makes recommendations so corrective action may be taken.
5%	M	Assists in the training of Contract Managers, Task Order Managers, and staff within CSU to secure and maintain consultant service contracts.

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5% M Assists in the development, improvement, marketing, and training of the district's CalMentor Program. This includes the development and maintenance of effective monitoring and evaluation procedures.

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 does not have supervisory responsibility. The ACA may act in a lead capacity on an as-needed basis.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Serves as a journey-level contract analyst. Must have strong analytical abilities to read, interpret, monitor, analyze, and provide reports as they relate to consultant payments, invoicing, and disadvantaged business utilization. Must have the ability to understand, develop, and maintain data and reports needed for contract administration; have familiarity with personal computers, word processing, spreadsheets, and database operations. Must possess the ability to develop and maintain spreadsheets and database reports.

Must have the ability to reason logically and creatively to review and/or interpret cost proposals, consultant invoices and consultant requests.

Must be detail-oriented, flexible in a rapidly changing environment, a team player, and able to communicate effectively in order to achieve successful job performance. Must have the ability to represent Caltrans' interests when coordinating with consultants and understand/evaluate both the performance of consultants and the products they produce. Must possess excellent written and verbal skills to effectively communicate technical information in reports, correspondence, and meetings. Must have good excellent interpersonal skills and work cooperatively with staff of all levels and backgrounds.

Must have the ability to properly manage the development and implementation of complex consultant contracts; to plan, organize, and coordinate efforts between consultants, Project Managers, and Functional Managers to ensure timely delivery of an accurate and complete product; to take the lead in special projects and preparation of responses to Caltrans management inquiries.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Failure to properly interpret and ensure compliance with current contract procurement procedures could result in costly disputes with consultants and local agencies, legal actions, and delays in providing the public with timely highway improvements. Is responsible for performing work in an accurate and timely manner by establishing priorities and exercising good judgment. Consequences of error or inability to perform in any aspect of these responsibilities may have an adverse effect on the unit's ability to ensure compliance with contracts and State and Federal requirements.

PUBLIC AND INTERNAL CONTACTS

This position will have extensive contact with personnel in HQ, in the district (particularly various division seniors), and with the public. This position will also have extensive contact with consultants before, during, and after execution of a contract.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for long periods of time using a keyboard terminal. Some bending, stooping, kneeling, and light lifting are required to retrieve supplies and prepare boxes for shipment. Physical requirements may include moving contract binders from one location to another.

Mental requirements include sustained mental activity for problem-solving. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must have the ability to develop new insights into situations, apply innovative solutions to make organizational improvements, and enable others to acquire the tools and support they need to perform well.

Emotional requirements include the ability to develop and maintain cooperative working relationships, respond appropriately to difficult situations, recognize emotionally charged issues or problems, and acknowledge various responses. Must be able to deal effectively with pressure, maintain focus and intensity, yet remain optimistic and persistent, even under adversity. Will consider and respond to the needs, feelings, and capabilities of different people in different situations. Must be tactful and treat others with respect.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Travel for this position may be required which may occasionally include overnight travel. Possession of a valid driver's license is required to operate a State-owned or leased vehicle.

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.

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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.

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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