

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Sr Equip Materiel Spec	OFFICE/BRANCH/SECTION Division of Equipment/Maintenance & Repair/HQ Shop	
WORKING TITLE Senior Equipment Materiel Specialist	POSITION NUMBER 932-032-1542-925	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:

Within the Division of Equipment (DOE), the incumbent is designated as a working lead-person, oversees and directs the parts department 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. Extensive use of a Windows based computer for input and retrieval of information. Possession of a class "C" driver's license is required. Receives supervision from the Equipment Materiel Manager I / II / III.

CORE COMPETENCIES:

As a Sr Equip Materiel Spec, 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 First, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety First, Strengthen Stewardship and Drive Efficiency - Engagement)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **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, Strengthen Stewardship and Drive Efficiency - Integrity)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, 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. (Safety First, Enhance and Connect the Multimodal Transportation Network - Engagement, Integrity)
- **Business Acumen**: Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Safety First, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity, Pride)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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35%	E	<p>Will assist and provide direction 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 Services Handbook. Will assist personnel to use the proper mode of purchase using Contract Delegation Purchase Order (CDPO) or Cal-card. Must have knowledge of existing Contracts, NASPO Leveraged Agreements, California Multiple Award Schedule, State Price Schedule, Prison Industry Authority, Master Rental Master Service Agreements and information to implement legal purchases. Will assist in processing CDPO's in a timely manner to comply with the Prompt Payment Act. Will assist with the 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. Will assist with all invoice-billing problems to bring them to a quick resolve. Will assist with the Cal-card Program to insure the proper use of the card, to assist in timely resolve to all disputed charges, and to immediately report any misuse or fraudulent use of a cardholders card, and to assist in keeping all cardholders information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Assist that all credits and warranty reimbursements are received. Assist with maintaining a vendor price file for all items stocked and purchased in quantity, and update annually. Assist with preparing specifications for materiel and services; solicits bids, negotiate with vendors on price, delivery and quality. Assist with 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.</p>
30%	E	<p>Help maintain various materials and supply inventories in the shop parts room, outside storage areas, warehouse, field shop locations and maintenance yards, and insuring 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. Insure 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. 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 re-organize stock for proper location and accessibility. Reconcile daily AssetWorks FleetFocus reports against receiving and disbursement documents for accuracy. Responsible for managing and coordinating daily transactions via Asset Works, FleetFocus Web Modules via the Materiel Services Portal this includes parts requests, purchase orders, direct issue parts, stock replenishment, commercial repairs, receipts and disbursements. Assist with the review of 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 or obsolete parts and supplies. Assist in removing the items from inventory. Assist and insure 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. Assist with the tire-recapping program.</p>
20%	E	<p>Help maintain Cal-card files for all cardholders. Help maintain hazardous waste document files including items returned to the shop for consolidation purposes. Help ensure that all documents are kept on file for the required file retention period set by the Department. Help ensure that required vendor forms are on file: The Vendor Data Record, Cal-Card Agreement and The Vendor Repair Agreement. Dusting, cleaning, mopping and sweeping work area as required.</p>
10%	E	<p>Assist with the review and approval of all purchasing documents. Assist shop supervisors and field mechanics on proper purchasing methods and the proper manner filling out purchasing documents. Mentor 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. Help 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. Help administer the safety eye-wear program. Help manage materiel recycle programs. Assist with directing the transport driver. Keep the Equipment Materiel Manager II informed of the parts departments' activities and all matters pertaining to the day to day operation.</p>

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5% M Assist with 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 insure Department of Motor Vehicle documents are correct. Prepare the Caltrans Equipment Identification form, DME76, "check sheets" on units received and route copies to proper departments. Periodically review stock and direct issue, on-order files to insure 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.

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

Will give daily direction to a staff of Equipment Materiel Specialists. Plan, develop and monitor your subordinates. Take notes and keep your supervisor informed of any personnel issues that may arise. Insure a safe work area. May be required to supervise for a specified limited period of time during supervisor's absence.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of legal procurement policies, procedures, and limitations as outlined in the Materiel Services Handbook and the Department of General Services delegation that is granted to the Division of Equipment, and using the proper cost coding. Knowledge of inventory, stocking, shipping, receiving and disposal procedures thorough knowledge of automotive, truck, and heavy construction equipment parts, accessories, tools and sources of supply. Understand basic computer operations with the ability to operate Windows based computers for input and retrieval of information. Working knowledge of Microsoft Office Professional. Follow the procedures as outlined in the Asset Works, FleetFocus - Web Modules Storeroom Training, AMS Advantage Handbook, FI\$Cal Instructions.

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: stand and walk on concrete flooring all day, frequently stooping, bending and kneeling; sit for prolonged periods of time; lift and move equipment parts and boxes weighing up to 50 pounds frequently, and up to 75 pounds occasionally; reach overhead to retrieve or place objects weighing up to 35 pounds; operate forklifts and hand operated materiel-handling devices; climb stairs carrying objects weighing up to 50 pounds on occasionally.

Possession of a class "C" driver's license and be able to travel to distant locations in inclement weather.

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

WORK ENVIRONMENT

The Senior Equipment Materiel Specialist will work primarily in the shop parts department adjacent to the shop. Primarily time in this position will be spent in the parts department environment. 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. It will be necessary to assist with the daily operation of the parts department which may

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include any or all of the duties listed below. You may be asked to make trips to the field mechanic locations to assist with the review the of parts department areas of responsibility.

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