

POSITION DUTY STATEMENT

PM-0924 (REV 06/2019)

CLASSIFICATION TITLE Associate Governmental Program Analyst	OFFICE/BRANCH/SECTION District 1 - Advance Planning	
WORKING TITLE Planning Budget & Hiring Analyst	POSITION NUMBER 901-800-5393-xxx	EFFECTIVE DATE

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the supervision of the Planning Support, Staff Services Manager, the incumbent is independently responsible managing the resources of all District Planning Programs and monitoring the District's SHOPP and Non SHOPP Project initiation Document work programs. Incumbent communicates both in written and verbal form with District management, and makes recommendations on how District Planning resources are utilized. This position serves as a contact person for answering project related questions from other units within Caltrans, outside agencies, and occasionally with the general public. Incumbent will monitor District 1 Planning Management program's administrative requirements and procedures to ensure compliance.

CORE COMPETENCIES:

As an Associate Governmental Program Analyst, the incumbent is expected to develop 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, and Goals.

- **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 and Health - Teamwork)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Stewardship and Efficiency - 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. (System Performance - Innovation)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Organizational Excellence - 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. (Stewardship and Efficiency - Commitment)
- **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. (System Performance - Commitment)
- **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. (Sustainability, Livability and Economy - Teamwork)
- **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. (Organizational Excellence - Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
30% E	Incumbent works independently monitoring the Advance Planning program (PIDs) by performing a variety of duties that include: collect and analyze PID, Planning, and Local Assistance budgetary information, coordinate budget reports and report program expenditures utilizing AMS Advantage, InfoAdvantage, PRSM, Asset Management Tool (AMT), and other available departmental systems. Verify and analyze data to determine future expenditures and project year-end balances to provide recommendations on budgetary shortfalls for personal service and operating expenditures. Is independently responsible for monitoring budget and resource issues for the PID program and makes recommendations to staff and management on resolving issues identified. Responsible for updating, maintaining integrity and consistency between PRSM, AMT, and the PID Work Plan. Serves as an information resource regarding proper charging procedures for Advance Planning, Planning, and Local Assistance staff. Develop and maintain tracking systems for analysis of performance of various programs including the PIDs

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POSITION DUTY STATEMENT

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30%	E	Independently creates packages for submittal to Administration for hiring new Advance Planning (PIDs), Planning, and Local Assistance staff. Responsible for knowledge of the process, procedures, and time lines for hiring new staff. Independently prepares Position Action Request Forms (PARF) packages for PID, Planning, and Local Assistance units. Provide workstation set up, attend to new staff requirements, and aid new personnel in their transition. Provide mandatory training list and links to new personnel. Track mandatory training completion and due dates for all staff.
20%	E	Independently prepares Purchase Requests. Verifies purchases are received and ensure payments are made promptly and in accordance with State of California and Department policies, procedures, and regulations. Utilize computer spreadsheets and paper records, and other resources to maintain PID and Planning units purchase requests file, reconcile VISA/CALCARD statements. Pay invoices within state deadlines. Develop and monitor acquisition process to improve system efficiencies in Planning purchases. Monitor inventory of office supplies and equipment. Planning PAC3 Document Remediation liaison. Provide support to Advance Planning (PIDs), Planning, and Local Assistance staff on supplies needed and basic IT workspace setup. Maintain proper storage of purchasing documents in accordance with record retention requirements and laws.
15%	E	As Division Property Control Liaison for Advance Planning (PIDs), Planning, and Local Assistance, incumbent is responsible for the purchasing, transferring, and tracking of Caltrans equipment. As Title VI Liaison for Advance Planning (PIDs), Planning, and Local Assistance, incumbent is responsible for staff Title VI mandatory training notifications and tracking, supplies of Title VI guidance and public meeting handouts, and the monthly submittal of Title VI Element Updates and Compliance reports. Incumbent makes daily reports of staff status for COVID 19 tracking. As the Department Training Liaison, incumbent assists staff in registering for trainings and making travel arrangements.
5%	M	Responsible for coordinating meetings for the Advance Planning (PIDs), Local Assistance and Planning staff including work activity and expenditure meetings for PID work. Attend training and meetings as needed. Responsible for meeting setup and preparation for Planning staff, as well as attend the meetings in a support role as needed taking minutes and providing equipment set up. Provide support to staff in travel processes such as coordinate calendars, prepare travel expense claims (TEC), and other documents in accordance with Department policies, procedures and regulations for Deputy and other Advance Planning (PIDs), Planning, and Local Assistance staff.

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

Non-Supervisory.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have a thorough knowledge of fiscal and personnel management principles, practices and trends; administrative analysis; budgetary procedures including purchasing and budget monitoring; modern office methods, forms and equipment; organization and functions of the department.

Must be able to reason logically and creatively using analytical techniques to resolve complex problems; work both independently and cooperatively as part of an interdisciplinary team. Must be able to analyze data and present ideas; communicate effectively both verbally and in written form; prioritize workload and manage multiple tasks while completing assigned tasks accurately and on time. Ability to develop and maintain a positive working relationship with internal and external partners.

Must have a working knowledge of computer applications and software, including but not limited to, Microsoft Windows, Excel, Word, and Outlook.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Failure to do job successfully could result in a significant loss of funding for the department or agencies with whom we work.

Failure to relate or interpret information correctly could result in loss of time and effort and effective use of funds.

PUBLIC AND INTERNAL CONTACTS

Contact with local and regional agencies, their staff, and the public. Contact with other functional units within the Planning Division, District 1, North Region, Federal Highway Administration (FHWA), and the Division of Local Programs in Sacramento.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for extended periods of time using a personal computer and while attending meetings. Incumbent must be congenial and tactful when dealing with others and must be able to develop and maintain cooperative working relationships. Must be self-motivated and be able to multitask, adapt to changes in priorities and complete tasks or projects with short notice. Travel may be required.

WORK ENVIRONMENT

While at their base of operation, the incumbent will likely both work from home and in a climate-controlled office under artificial lighting. The incumbent may be required to travel, work outdoors and to be exposed to dirt, noises, uneven surfaces, and/or extreme heat or cold.

TELEWORK - This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required and reimbursement considers an employee's designated headquartered 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.)

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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