

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Staff Services Manager I	OFFICE/BRANCH/SECTION HQ/44 Project Management/PDWD	
WORKING TITLE Project Management Engineering Data Support (Specialist)	POSITION NUMBER 913-176-4800-003	REVISION DATE 11/22/2024

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 general direction of the Office Chief, Program Delivery and Workload Development, a Supervising Transportation Engineer, the incumbent collects, studies and summarizes project delivery and financial data to reveal ways to improve Caltrans' project delivery efficiency and data quality. This includes analyzing and summarizing data from various databases, including but not limited to, Project Resource and Schedule Management (PRSM), AMS Advantage (AMS), and California Transportation Improvement Program System (CTIPS). These systems are the basis of the computer-oriented processes and tools that are used to develop and manage workload and schedules for all the Capital Outlay Support (COS) projects across the state. The incumbent also leads the Project Change Request (PCR) process within the Division of Project Management, including preparing for, chairing, and preparing outcomes of the PCR Committee meetings, tracking PCRs throughout the approval process, and archiving approved PCRs.

**CORE COMPETENCIES:**

As a Staff Services Manager I, 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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, 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, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity, Pride)
- **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, Integrity, Pride)
- **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, Equity, Innovation)
- **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, 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 - Engagement, Innovation, Integrity, Pride)

**TYPICAL DUTIES:**

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

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40%	E	Serve as a technical Subject Matter Expert (SME) for the Office of Program Delivery and Workload Development on COS project data. Use data analysis expertise and Tableau Creator or Microsoft Power BI to perform tasks pertaining to the successful monitoring and delivery of the statewide COS portfolio of projects including: <ul style="list-style-type: none"> <li>• Developing data visualizations and dashboards related to a variety of COS topics, including but not limited to, project expenditures and budgets, phase durations, support-to-capital ratios, district/geographical comparisons, project change requests, project size, and project type for past, present, and future projects;</li> <li>• Performing data analytics and identifying project delivery trends and anomalies that could lead to project delivery process improvements;</li> <li>• Performing high-level quality control/quality analysis of statewide COS project data.</li> </ul>
35%	E	Process Project Change Requests (PCR). Develop the agenda for PCR meetings, chair PCR meetings, summarize the results of the meetings, track progress of PCRs, and coordinate with District staff, HQ Program Managers, and HQ Financial Programming throughout the approval process.
10%	E	Develop ad hoc reports and presentations regarding budget, workload, and expenditures that provide management with a plain language, easily understood, and concise presentation of findings. Reports may be provided to Department management, the Legislature, the Legislative Analyst's Office, and the Department of Finance. Use analyzed data to create and present information to Caltrans management, external agencies, and the public regarding the COS portfolio of projects.
10%	E	Proactively review and analyze project-related data in various databases, including but not limited to, PRSM, CTIPS, and AMS to ensure the quality of data used for project delivery reporting and workload projections. Cooperatively work with other office staff, other divisions in Headquarters, and the districts to correct inaccurate, obsolete or inconsistent project-related data in the source systems.
5%	M	Analyze legislative bills that potentially affect the Division of Project Management. Research, develop and recommend improvements to current project management policies, business practices, memoranda, manuals, tools, and other guidance documents.

<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**

The incumbent does not supervise.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

**Knowledge:** A general knowledge of organizational relationships and engineering functions within Caltrans that pertain to the transportation facility project development process. Knowledge of the Department's accounting systems, practices, policies and procedures are essential.

**Abilities:** Must have, or acquire within six months, the ability to use Tableau Creator or Microsoft Power BI to prepare data visualizations and dashboards using data from various project delivery and financial databases. Must have the ability to use tools to analyze data and ensure data quality. Must have the ability to communicate effectively with all levels of management and staff orally, in writing, and with visual aids. Must have the ability to work cooperatively and effectively in a team environment. Must have excellent organizational skills.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

The incumbent is responsible for independent action and initiative in carrying out assigned duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate actions. Poor decisions may result in (1) inaccurate representation of project data, (2) loss of credibility with decision makers and oversight agencies, or (3) the development of inaccurate recommendations upon which others rely.

**PUBLIC AND INTERNAL CONTACTS**

The incumbent must interact with Project Managers, District Budgets units, Program/Project Management Support Units and HQ units, including but not limited to the Divisions of Accounting, Budgets, and Financial Programming. The incumbent must work cooperatively and effectively in a team environment with District, Division of Engineering Services and Headquarters staff. The incumbent must also prepare and make presentations to Headquarters and District managers as required.

**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Employee will be required to sit for long periods of time using a keyboard and video display terminal, develop and maintain cooperative working relationships and focus for long periods of time. Must have the ability to multi-task, adapt to changes in

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priorities, and complete tasks or projects with short notice.

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### WORK ENVIRONMENT

Employee may work in a climate-controlled office under artificial light. Employees may be required to travel in state. Frequency of travel is expected to be very low.

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.

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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.)

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.

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EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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)

SUPERVISOR (Signature)

DATE

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