

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Equipment Materiel Specialist	OFFICE/BRANCH/SECTION Division of Equipment/Budgets & Admin/Matl Svcs/3251	
WORKING TITLE Equipment Materiel Specialist	POSITION NUMBER 932-001-1552-925	REVISION DATE 09/01/2022

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:**

In the Division of Equipment located at Headquarters Materiel Services under direction of the Equipment Materiel Coordinator performs Equipment Materiel Services 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. Analyzes Fleet Management reports and writes stock orders for field locations. Incumbent must possess a valid class C driver's license.

**CORE COMPETENCIES:**

As an Equipment Materiel Specialist, 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Lead Climate Action - Engagement)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Strengthen Stewardship and Drive Efficiency - Equity)
- **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. (Cultivate Excellence - Engagement)
- **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)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. ( Advance Equity and Livability in all Communities - Equity)
- **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. (Enhance and Connect the Multimodal Transportation Network - Innovation)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety First - Pride)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Cultivate Excellence - Pride)

**TYPICAL DUTIES:**

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

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50%	E	Purchasing - Analyzes Fleet Management reports and writes stock orders for field locations. Determines proper cost toping and enters on purchase documents. Must be familiar with all purchasing regulation outlined in the Materiel Operations Handbook. Must determine the proper mode of purchase using CAL-Card. Must have knowledge of existing Contracts, CMAS, SPS, PIA, Master Service Agreements and information to implement legal purchases. Must process CPOs and POs in a timely manner to comply with the Prompt Payment Act. Must perform monthly reconciliation of the CAL-Card purchases in a prompt manner and have purchasing documents into Accounting by the 8th day of each calendar month. Must see that all invoice-billing problems are brought to a quick resolve. Bring timely resolve to all disputed charges, and to immediately report any misuse or fraudulent use of your CAL-Card, and to keep all cardholder information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Be sure that all credits, and warranty reimbursements are received. Learn proper use of the vendor price file for all items stocked and purchased in quantity, to assure we are getting the best quality and, price on the items purchased. Prepare specifications for materiel and services; solicits bids, selects vendors, negotiate with vendors on price, delivery and quality. See that all parts and materiel ordered are delivered promptly. Help the Division of Equipment meet the goals of spending 25% with Certified Small Business Enterprises and 3% with Disabled Veteran Enterprises.
40%	E	Processes POs in a timely manner to comply with the Prompt Payment Act. Performs monthly reconciliation of the CAL-Card purchases and submits purchasing documents to the Division of Accounting by the 8th day of each calendar month. Ensures all invoice-billing problems are brought to a quick resolve. Brings timely resolve to all disputed charges, and to immediately report any misuse or fraudulent use of your CAL-Card, and to keep all cardholder information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Ensures that all credits and warranty reimbursements are received. Maintains PO logs and CAL-Card files and ensures all documents are kept on file for the required file retention period set by the Caltrans retention schedule.
5%	M	Ensures shipments are examined for quantity and quality of merchandise being received; receiving problems are resolved and receiving data is entered into computer system; items are put away and stored properly; materials are removed from stock and prepared for shipment; bills of lading are prepared properly and hazardous materials are properly handled and shipped.
5%	M	Ensures required vendor forms are on file when using the pre-qualified vendor justification. These include The Drug Free Workplace Certification, The Vendor Payee Data Record, and The Vendor Repair Agreement. Responsible for maintaining the cleanliness of work areas as required. This may include dusting, cleaning, mopping and sweeping.

<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**

N/A

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of legal procurement policies, procedures, and limitations as outlined in the materiel operations handbook and in 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, procedures as outlined in the Materiel Services Handbook.

Knowledge of inventory, stocking, shipping, receiving and disposal procedures, as outlined in the Materiel Services Handbook.

Knowledge of and the ability to learn automotive, truck, and heavy equipment parts, accessories, tools and sources of supply.

Understand basic computer operations with the ability to operate computer hardware and various software programs for input and retrieval of information.

Be able to communicate clearly. Ability to handle multiple priorities.

Subject to working overtime and variable work shifts. Must be able to work during emergency or declared emergency situations.

**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 .

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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

Contact with Materiel Services personnel, DOE Operations staff, employees from various divisions with Caltrans such as Division of Accounting and Department of Procurement and Contracts, staff from various state agencies, and suppliers.

### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal. The incumbent must have the ability to develop and maintain friendly and cooperative working relationships with those contacted in the course of the work day, communicate effectively, and respond appropriately to difficult situations. Must have the ability to multi-task, adapt to changes in priorities, and complete projects within short lime frames. Must be able to stand and walk on concrete flooring all day, frequently stooping, bending and kneeling; 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; climb stairs - carrying objects weighing up to 50 pounds on occasionally.

Possession of a class "C" drivers 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

Employees will work in a climate-controlled office under artificial lighting, as well as travel to field locations at varying times of the day or night and in inclement weather as required. This position is part of a distributed team that involves teleworking and reporting to the office as needed or required.

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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