

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Staff Services Analyst (Gen)	OFFICE/BRANCH/SECTION D10/Administration/Business Operations	
WORKING TITLE Executive Office Liaison	POSITION NUMBER 910 001 5157 XXX	REVISION DATE 09/25/2024

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 supervision of the Chief of Business Operations (Staff Services Manager II), the incumbent is responsible for providing a variety of analytical and administrative support services to the District Director and the District Executive Management Team. The incumbent provides a wide range of high-level administrative services and regularly communicates with Caltrans Executive-level management, district managers and supervisors, state and local governmental agencies, elected officials, private and public groups, and the general public. The incumbent performs independent research and analysis to develop directives and generate reports. The incumbent also manages Executive Office correspondence and various District-level programs, activities, and projects. The incumbent exercises a high degree of initiative and independence while maintaining confidentiality due to highly sensitive issues pertaining to district operations and personnel matters.

CORE COMPETENCIES:

As a Staff Services Analyst (Gen), 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. (Cultivate Excellence - Engagement, Integrity, Pride)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, 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 - Engagement, Innovation, Integrity)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, Integrity, Pride)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence - Engagement, Innovation)
- **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 - Engagement, Innovation, Integrity)

TYPICAL DUTIES:

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

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40%	E	<p>Conducts research and analysis for special projects assigned by the District Director. Researches, analyzes, and compiles information from various sources (i.e. Federal and State laws, regulations, standards, best business practices, etc.) to develop policy manuals and strategic plans for the Executive Office to implement District policies, procedures, directives, and programs (ensuring compliance with applicable laws and standards). The incumbent is responsible for independently reviewing, gathering, researching, and analyzing data, and compiling comprehensive reports and responses on behalf of the District Director related to the Strategic Plan and resulting measurable action items. Responsible for researching and gathering information, completing data analysis comparisons, and monitoring, tracking, and developing process guidelines based on the Departmental Strategic Plan and the District Strategic Action Plan. Incumbent will also track and disseminate the development of district policies for implementation by the District Director. Works directly with District Directors and/or Executive Management to review status of completion and the need for revised or new strategies to meet goals.</p> <p>Through independent analysis and review, makes recommendations to Executive Management regarding the resolution of complex, technical, and confidential issues, inquiries, and requests for information from Headquarters, Districts, government agencies, and the public. Serves as the primary contact/liaison between Executive Office and legal experts, Division Chiefs, Headquarters staff, external partners, and elected officials. Works with District Director and Executive Management to handle complex and sensitive issues which arise in the implementation of programs or negotiations with agencies and community leaders. Exercises independent judgment in the release of confidential and sensitive information.</p>
35%	E	<p>Independently organizes, reviews, monitors, and tracks all documents received for the District Director. Prepares responses on behalf of the District Director. Reviews incoming correspondence from the executive management team, legislators, media, and the general public. Technically edits all correspondence for signature, ensuring content is consistent with departmental policy and practices. Independently researches, compiles factual data and prepares non- technical correspondence/reports for the District Director's signature.</p> <p>Maintains the Director's Office Tracking System (DOTS) assignments, assigns tasks received from the Director's Office, and tracks, monitors, and evaluates the progress and completion of those assignments. Monitors the mail log database to determine the timeliness and accuracy of responses. Makes recommendations to the Executive Management Team on the development and delivery of correspondence to the Governor, Caltrans Director, Legislative staff, and the public. Responsible for the preparation and maintenance of the Local Agency Directory.</p>
15%	E	<p>May be required to assist office staff in performing administrative duties critical to the Executive Office. This includes planning commitments for the District Director and/or Deputy District Directors, developing meeting content or agendas, facilitating meetings, screening phone calls, processing administrative paperwork, and other duties as needed.</p> <p>Serves as the District 10 Out of State and Country Travel Coordinator. Analyzes all requests for Out of State and Country travel based on budget and District needs, and makes independent recommendations for approval of travel documents to Departmental Directorate, Agency, and Governor's offices.</p> <p>Coordinate District Director's travel requests, calculate costs, and submit requests to HQ for approval. Submit individual trip requests and follow-up to ensure timely approval by the Director's Office and Agency so trips are not compromised. Gather, organize and prepare all materials require for the trip/meeting and have them ready the day before travel. Prepares DD's travel expense claims accurately and in a timely manner.</p>
5%	E	<p>Manages and maintains records of 25 Year Service Awards, Retirement Awards, Superior Accomplishment Awards, and Sustained Superior Accomplishment Awards. This includes notifying supervisors and managers of employees reaching these milestones, ensuring that employees receive recognition certificates. Monitors other professional awards by utilizing the award calendar. Researches and interviews subject matter experts to draft award nominations on behalf of the District.</p>
5%	M	<p>Acts as a back up to the Executive Secretary I (ES I) to the Deputy District Directors (DDD). In the absence of the ES, the Staff Service Analyst will act in the full capacity including, but not limited to: answering phones, scheduling meetings, preparing folders and attending meeting and taking minutes.</p>

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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 supervise; however, the incumbent may provide general direction to district clerical staff in regard to policy and procedures related to preparing correspondence and other clerical-related procedures.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires knowledge of modern office methods, supplies, equipment, departmental policies and procedures and a wide knowledge of vocabulary, grammar, spelling, business English and correspondence.

Must possess the ability to analyze administrative problems and adopt an effective course of action. Establish and maintain cooperative working relationships and speak and write effectively. Must demonstrate a capacity for assuming increasing administrative responsibilities. Must be innovative and be able to work as a productive member of a team. The incumbent must be able to multitask in a busy office environment with many interruptions from calls and visitors. Staff Service Analyst must be able to complete assignments on time and within budget.

Must be able to type, take minutes, read and write English at a level required for successful job performance; type at 40 words per minute; make briefs of reports and correspondence; independently prepare correspondence from oral or written instructions, and independently perform administrative assignments. Incumbent must be able to communicate effectively both orally and written; handle with courtesy and tact a wide variety of public contacts both on the telephone and in person. Must be able to analyze situations accurately and take effective action perform difficult clerical work and keep difficult records. Staff Service Analyst must possess skills to relieve DD of clerical/administrative functions by performing these duties.

Incumbent must have knowledge of departmental activities, goals, objectives, policies and procedures. Incumbent must have knowledge of director's vision, goals, and objectives and must support the DD to achieve them. This position requires working knowledge of all district activities and those subjects of special interest to the DD.

Staff Service Analyst must have computer experience, knowledge and abilities. Incumbent must be proficient at Microsoft Windows, Word, Excel, Access and other computer programs such as Microsoft Outlook. Must be proficient in the use and knowledge of the department's DOTS System.

Demonstrate interest in assuming increasing responsibility; possess mature judgment, loyalty, tact and discretion.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must be sensitive and exercise good judgment in dealing with the public, outside agencies, and Caltrans staff. Not providing adequate administrative support, not responding to inquiries, conveying inaccurate information or confidential information could impact sensitive projects, affect critical deadlines, goals, and objectives and reflect poorly on the integrity of the organization.

The Staff Service Analyst is often the first contact the public, the media, and other public employees have with Caltrans. The incumbent must use tact and good judgment in all situations and maintain confidentiality when required, communicate effectively and professionally with everyone. Failure to use good judgment can directly impact the District and affect the Department as a whole. The result can range from embarrassment to loss of funding to violations of the Departmental policies and regulations.

PUBLIC AND INTERNAL CONTACTS

The incumbent will have frequent contact with a wide variety of individuals, including those affiliated with the Governor's office; headquarters; the Legislature; State and local government; the U.S. Department of Transportation; other public and private organizations. Tact and sensitivity to request must be exercised. The incumbent will have extensive daily contact with employees at all levels within the Department of Transportation as well as the general public including representatives of the legislature and other public interest groups.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a telephone, keyboard, and video display terminal. Mental and emotional requirements are those associated with working in a high level, fast paced office and dealing with busy executives and their clients. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on time with short notice. Employee may be required to move medium size boxes of projects on time with short notice. Employee may be required to move medium size boxes of material and packages from one location to another and must be able to lift and carry 40 lbs.

This position requires patience, understanding, diplomacy, and tact when dealing with a high volume of requests from a diverse group of people. Other requirements include the ability to develop and maintain cooperative working relationships; respond appropriately to difficult situations; recognize emotionally charged issues or problems, and acknowledge the various responses. Must deal effectively with pressure, maintain focus and intensity, yet remain optimistic and persistent even under adversity. Must

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be able to stay mentally focused for long periods of time.

WORK ENVIRONMENT

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.

Incumbent will work in a climate-controlled office under artificial lighting; however, due to unexpected heating and air conditioning problems, building temperature may fluctuate.

Will also be required to travel to field office locations, District Offices, Headquarters, other districts throughout the district to attend meetings or trainings. Occasional overtime, night work, and overnight travel may be 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.)

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
