

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Equipment Materiel Manager III	OFFICE/BRANCH/SECTION Division of Equipment/Maintenance & Repair/Shop 8/3232	
WORKING TITLE Equipment Materiel Manager III	POSITION NUMBER 932-028-1563-925	REVISION DATE 1/29/25

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:

While working for the Caltrans Division of Equipment and under general direction of the Highway Equipment Superintendent III, incumbent supervises staff engaged in Equipment Materiel Operations. Plans, organizes, and directs the Parts Department operation in a large District Equipment Shop for the repair of complex automotive construction and highway maintenance equipment. This includes areas such as purchasing, inventory, disbursement, shipping & receiving of equipment parts, materials, related equipment for the fabrication, maintenance, repair and disposal of mobile equipment. Possession of a valid driver's license is required when operating a state owned or leased vehicle.

CORE COMPETENCIES:

As an Equipment Materiel Manager III, 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.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Cultivate Excellence - Engagement)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Advance Equity and Livability in all Communities - Integrity)
- **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 - 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. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **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. (Safety First - Innovation)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Strengthen Stewardship and Drive Efficiency - Engagement)

TYPICAL DUTIES:

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

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35%	E	Review and approve all purchasing documents. Train shop supervisors and field mechanics on proper purchasing methods and the proper manner of filling out purchasing documents. Give guidance and train subordinate Equipment Materiel Managers 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. 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. Administer the safety eyewear program. Help manage materiel recycle programs. Keep the Shop Highway Equipment Superintendent III informed of the parts department's activities.
20%	E	Audits and is responsible 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 Operations Handbook. Must determine the proper mode of purchase using Purchase Authority Purchase Order (PAPO) or Calcard. Must have thorough knowledge of existing Contracts, California Multiple Award Schedules, State Price Schedules, Prison Industry Authority, Master Rental Master Service Agreements, and information to implement legal purchases. Must ensure that PAPOs are processed in a timely manner to comply with the Prompt Payment Act. Must ensure that the monthly reconciliation of the Calcard program is completed in a prompt manner and have purchasing documents into Accounting by the 8th day of each calendar month. Must oversee all invoice-billing problems to bring them to a quick resolve. Must oversee all Calcard Program to insure the proper use of the card, to insure timely resolve to all disputed charges, to immediately report any misuse or fraudulent use of a cardholders card, and to keep all cardholder information up to date using Account Maintenance Forms, including the cancellation or request of a new card. Ensure that all credits and warranty reimbursements are received. Maintain a vendor price file for all items stocked and purchased in quantity, and update annually. Prepare specifications for materiel and services, solicits bids, negotiate with vendors on price, delivery, and quality. Responsible for 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.
20%	E	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, and complete check at the Field Mechanic locations. Make inspection trips to field locations, report your findings on the Field Location review form, and keep on file. 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 reorganize stock for proper location and accessibility. Reconcile daily Fleet Management reports against receiving and disbursement documents for accuracy. Responsible for the keypunching and coordinating the input of daily transactions via the computer terminal including direct issue parts, commercial repairs shop stock receipts, and disbursements. Review 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 / obsolete parts and supplies. Remove items from inventory and prepare Property Survey Report noting the reason for disposal and the method being used. Responsible for the legal disposal of all hazardous waste material and scrap. Log in and assign property tag to all new non-expendable equipment. Conduct yearly computer and non-expendable inventory.
15%	E	Oversee 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 Vehicles documents are correct. Prepare Caltrans Equipment Identification (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.

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10%	M	<p>Maintain PAPO logs and Cal-card files for all cardholders. Maintain hazardous waste document files, including items returned to the shop for consolidation purposes. Ensure that all documents are kept on file for the required file retention period set by the Department. Ensure that required vendor forms are on file: The Drug Free Workplace Certification, The Vendor Data Record, and The Vendor Repair Agreement. Help maintain the Vendor Repair Agreement Database. Create and maintain the Shop Business Plan. Create and Maintain the Shop Material Safety Data Sheet Right to Know stations.</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

Supervises Equipment Materiel Manager I and provides functional supervision over field mechanics in matters pertains to stocking and purchasing. Oversees the daily operation of the Main Shop and Sub-shop parts department operations. Plans, develops, and monitors staff. Takes proper corrective action. Ensures a safe work area.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

A thorough knowledge of: Legal procurement policies, procedures, and limitations as outlined in the SAM Manual; 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; automotive, truck, and heavy equipment parts, accessories, tools and sources of supply.

Knowledge of: Inventory, stocking, shipping, receiving, and disposal procedures; basic computer operations with the ability to operate mainframe and PC based computers for input and retrieval of information.

Knowledge of and ability to understand and put into practice the Safety requirements of the section being supervised.

Ability to: Exercise patience; handle multiple priorities; follow the procedures as outlined in the Fleet Anywhere / Management manual; write letters, prepares written reports, and conducts meetings; manage and supervise people; work overtime and variable works shifts as necessary; work during emergency or declared emergency situations.

Must have an in-depth understanding of supervision, communication, training, delegation and morale.

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.

PUBLIC AND INTERNAL CONTACTS

Extensive contact with shop supervisors, field mechanics, district employees and vendors.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Ability to: Walk on concrete flooring, stoop, bend, and kneel on occasion, if required; sit for prolonged periods of time; lift and move equipment parts and boxes weighing up to 75 pounds on occasion, if required; reach overhead to retrieve or place objects weighing up to 35 pounds on occasion, if required; climb stairs carrying objects weighing up to 50 pounds on occasion, if required; travel to distant locations in inclement weather; operate forklifts and hand operated materiel-handling devices.

Possession of a valid driver's license is required when operating a state owned or leased vehicle.

Will be required to wear safety equipment, including eye protection (safety glasses), ear plugs, safety vest, and hard hat.

WORK ENVIRONMENT

The Equipment Materiel Manager III will work primarily in the front office outside of the parts department. Primarily time in this position will be spent inside an office environment. At times it may be necessary to assist with the daily operation of the parts department, which may include any or all of the duties listed. At times it will be necessary to make trips to Field Mechanic locations to review their inventory and stock areas. Must be able to work during inclement weather, which may include the severe cold or heat.

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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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.)

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