

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Governmental Program Analyst	OFFICE/BRANCH/SECTION D08 / Program Project Management / Consultant Services Unit	
WORKING TITLE Associate Contract Analyst	POSITION NUMBER 908-221-5393-013	REVISION DATE

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

**GENERAL STATEMENT:**

Under the general supervision of the Consultant Services Unit supervisor, a Staff Services Manager I, the incumbent will serve as an Associate Governmental Program Analyst, assisting Contract Managers in the administrative of Architectural and Engineering (A&E) and Hazardous Waste contracts as well as Interagency Agreements. The Associate Governmental Program Analyst will perform the more responsible, varied, and complex technical analytical staff services assignments such as financial and analytical evaluations and assessments on these contract and agreements.

**CORE COMPETENCIES:**

As an Associate Governmental Program Analyst, 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. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **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. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **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. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **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. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Prosperity, Employee Excellence - Integrity, Stewardship)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Prosperity, Employee Excellence - Integrity, Stewardship)

**TYPICAL DUTIES:**

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

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30%	E	<p>As an Associate Contract Analyst, incumbent will act as a State representative throughout the life of the contract, providing guidance to Consultants, Task Order Managers, and Contract Managers on invoicing procedures and issues. Will advise Contract Managers on the evaluation of cost proposals for new task orders on existing executed contracts. Will evaluate and analyze cost proposals.</p> <p>Will independently review and analyze the format and content of submitted invoice packages to ensure compliance with contract, federal and state requirements and determine whether the submittals are acceptable for further processing. Will ensure Consultants receive payment in a timely manner and in accordance with the California Prompt Payment Act. In the event it is necessary to dispute an invoice, incumbent will clearly identify the problem and make recommendations for resolution. Will resolve disputes independently with consultants - once disputes are resolved, incumbent will develop and implement amended or new internal/external procedures to improve future efficiency and accuracy.</p>
30%	E	<p>Incumbent will assist in providing and implementing contract management/administration for consultant, hazardous waste, and interagency agreements, as well as assist in providing the District's expertise and knowledge base for contract management. It is the Associate Governmental Program Analyst's (AGPA's) responsibility to become thoroughly familiar with the various aspects of the contract and cost proposal such as milestone schedules, method of payment and limitations, provisions for salary increases, fees, etc.</p> <p>Incumbent will handle the more complex contracts and invoices for the Consultant Services Unit (CSU), such as those requiring detailed prevailing wage calculations and examination. Incumbent will examine Labor Compliance documentation, Certified payroll, individual staff rate increases and fringe benefits based on standards set by the US Department of Labor and the State Department of Industrial Relations. Through assessment of the Consultant's Cost Proposal and Personnel Request, will determine and verify the appropriate use of classifications for the work required, the labor rate, and the overhead and profit percentage in conjunction with processing consultant invoices. Will research and analyze current practices to develop and implement more streamlined procedures relating to invoice process and tracking that improve efficiency and accuracy.</p> <p>In the event of an audit, incumbent will provide CSU information and documents as requested. At the completion of the audit, will present Contract Manager and Consultant Services Unit Manager suggested courses of action pertaining to invoicing for corrections and adjustments based on audit findings.</p>
30%	E	<p>In order to keep accurate account of cash management in each assigned contract, the incumbent will produce and utilize accounting reports detailing contract expenditures and encumbrances from various budgetary databases including but not limited to EFIS/CGI Advantage, Enterprise Datalink, FileMaker Pro Consultant Contract Management and Work Plan Status (WPS) systems. Will analyze reports, target dates, and spending trends to ensure all contract authority remains within allocated budget. At the start of each Task Order, incumbent will ensure encumbrance of funds through the EFIS/CGI Advantage system. At the completion of each Task Order and Contract, prepare a complete account of all invoices and payments made. Confer and reconcile with Consultant to assure all invoices were submitted and all payments have been made before close out. Incumbent will analyze the Contract Financial Monitoring Report (CFMR) for each assigned contract on a monthly basis comparing Consultant's data to actual expenditures and consultant's projections to executed Task Orders in order to identify and advise Contract Managers and Consultants of inconsistencies, possible future issues, and suggested courses of action.</p>
10%	M	<p>Employee will compile and interpret statistical data from contract database, ledgers and reports, in order to provide support to the Consultant Services Unit Manager for the completion of the monthly Capital Outlay Support Tracking (COST) report. Employee may need to utilize Project Resource and Schedule Management (PRSM) database to verify project resource status. May also need to attend meetings and confer with Consultants, Task Order Managers, Contract Managers, and various office staff on budget status of Contracts and Task Orders. Will identify fund type changes within phases of individual projects and interpret the effect on the budget of existing Task Orders. Will need to present information in writing and orally as required.</p>

<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**

None. May act in a lead worker or team leader capacity.

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## POSITION DUTY STATEMENT

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must be able to analyze and interpret policies, agreements, and contracts; develop and implement new and revised procedures; maintain accurate records; and take action independently. Must also have the ability to work closely and effectively with others and be able to communicate effectively, both orally and in writing. Must be able to follow oral and written directions. Must be able to operate a computer and have an aptitude for learning various software programs. Must have working knowledge of Windows computer workstation operating systems and service applications such as EFIS/CGI Advantage, Info Advantage, Enterprise Datalink, Filemaker Pro and PRSM.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The inappropriate use or over-expenditure of allocated resources could establish an illegal obligation and/or expenditures of funds; create problems requiring the need for the Department to make an explanation to the Department of Finance and the State Legislature; and result in delays in providing the public with timely highway improvements.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent has frequent contact with all levels of District personnel, Headquarters staff in various Divisions, and consultants. Maintaining professional working relationships with consultant administrative support staff is critical.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

**Physical:** The incumbent will be required to sit for long periods of time using a keyboard and video display monitor. The position requires manual dexterity to operate and view a computer for database updates, spreadsheets, project funding research, and creation of various Advantage documents.

**Mental:** Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must be able to concentrate for prolonged periods of time in order to review and create documents while meeting strict deadlines. Must be detail oriented with the ability to produce accurate work on a consistent basis.

**Emotional:** This position requires interaction with many people. Must be able to develop and maintain cooperative relationships. The employee must be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Must behave in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service.

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### WORK ENVIRONMENT

While at their base of operation, the incumbent will work indoors in a climate-controlled office under artificial lighting. Activities include, but are not limited to, sitting for prolonged periods of time while using the telephone, keyboard, and video display monitor. Keyboard use will be a minimum of 75% of the time. May require employee to work overtime and vacations may be restricted during expected and/or unexpected peak workload periods. This position may require rotation within the Division of Program Project Management.

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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)

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EMPLOYEE (Signature)

DATE

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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)

Elias Gutierrez

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SUPERVISOR (Signature)

DATE

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**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Staff Services Analyst	OFFICE/BRANCH/SECTION D08 / Program Project Management / Consultant Services Unit	
WORKING TITLE Contract Analyst	POSITION NUMBER 908-221-5157-XXX	REVISION DATE

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

**GENERAL STATEMENT:**

Under the general supervision of the Consultant Services Unit supervisor, a Staff Services Manager I, the Staff Services Analyst will assist Contract Managers in the administration of Architectural and Engineering (A&E) and Hazardous Waste contracts as well as Interagency Agreements. The Staff Services Analyst will perform entry through first journey level assignments by the analytical and evaluative nature of work, such as financial and analytical evaluations, and assessments on these contracts and agreements.

**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.

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

**POSITION DUTY STATEMENT**

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30%	E	<p>The incumbent will act as a State representative throughout the life of the contract, supporting and providing guidance to Consultants, Task Order Managers, and Contract Managers on invoicing processes and issues. Will receive training from full journey level analysts on the evaluation of cost proposals for new task orders on existing executed contracts. Will use good judgment in the analytical review of cost proposals.</p> <p>Incumbent will review and analyze the format and content of submitted invoice packages of average difficulty to ensure compliance with contract, federal and state requirements and will determine whether the submittals are acceptable for further processing. Will ensure Consultants receive payment in a timely manner and in accordance with the California Prompt Payment Act. In the event it is necessary to dispute an invoice, incumbent will clearly identify the problem and make recommendations for resolution to the Consultant Services Unit Manager. Will identify disputes with consultants and reports findings- once disputes are resolved, will develop and recommend amendments or new internal/external procedures to improve future efficiency and accuracy.</p>
30%	E	<p>Incumbent will assist in providing and recommending contract management/administration for consultant, hazardous waste, and interagency agreements. It is the Staff Services Analyst's responsibility to become familiar with the various aspects of the contract and cost proposal such as milestone schedules, method of payment and limitations, provisions for salary increases, fees, etc.</p> <p>Will handle less complex contracts and invoices for the Consultant Services Unit (CSU) receiving direction and building knowledge from the Consultant Services Unit Manager and high-level analysts. Through assessment of the Consultant's Cost Proposal and Personnel Request, incumbent will determine and verify the appropriate use of classifications for the work required, the labor rate, and the overhead and profit percentage in conjunction with processing consultant invoices. Will research and analyze current practices to develop and recommend more streamlined procedures relating to invoice process and tracking that improve efficiency and accuracy. In the event of an audit, incumbent will work with the high-level analysts to provide CSU information and documents as requested. At the completion of the audit, will present Contract Manager and Consultant Services Unit Manager the findings pertaining to invoicing for the recommended corrections and adjustments.</p>
30%	E	<p>In order to keep accurate account of cash management in each assigned contract, the incumbent will produce and utilize accounting reports detailing contract expenditures and encumbrances from various budgetary databases including but not limited to EFIS/CGI Advantage, Enterprise Datalink, FileMaker Pro Consultant Contract Management, and Work Plan Status (WPS) systems. Will analyze reports, target dates, and spending trends to ensure all contract authority remains within allocated budget. At the completion of each Task Order and Contract, incumbent will prepare a complete account of all invoices and payments made. Will confer and reconcile with Consultant to assure all invoices were submitted and all payments have been made before close out. Incumbent will analyze less complex Contract Financial Monitoring Report (CFMR) for each assigned contract on a monthly basis comparing Consultant's data to actual expenditures and consultant's projections to executed Task Orders in order to identify and consult with Contract Managers and Consultants of inconsistencies, possible future issues, and suggested courses of action.</p>
10%	M	<p>Under the supervision of the Consultant Services Unit Manager, employee will compile and interpret statistical data from contract database, ledgers and reports, in order to provide support to the Consultant Services Unit Manager. Will utilize Project Resource and Schedule Management (PRSM) database to verify project resource status. Attend meetings and confer with Consultants, Task Order Managers, Contract Managers, and various office staff on budget status of Contracts and Task Orders. Will identify fund type changes within phases of individual projects and interpret the effect on the budget of existing Task Orders. Incumbent will present information in writing and orally as required.</p>

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**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

None.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

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Must be able to operate a computer and have an aptitude for learning various software programs. Must have working knowledge of Windows computer workstation operating systems and service applications such as EFIS Advantage, Info Advantage, Filemaker Pro and PRSM.

### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The inappropriate use or over-expenditure of allocated resources could establish an illegal obligation and/or expenditures of funds; create problems requiring the need for the Department to make an explanation to the Department of Finance and the State Legislature; and result in delays in providing the public with timely highway improvements.

### PUBLIC AND INTERNAL CONTACTS

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

**Physical:** The incumbent will be required to sit for long periods of time using a keyboard and video display monitor. The position requires manual dexterity to operate and view a computer for database updates, spreadsheets, project funding research, and creation of various Advantage documents.

**Mental:** Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must be able to concentrate for prolonged periods of time in order to review and create documents while meeting strict deadlines. Must be detail oriented with the ability to produce accurate work on a consistent basis.

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### WORK ENVIRONMENT

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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.

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)

Elias Gutierrez

SUPERVISOR (Signature)

DATE

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