

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Transportation Engineer (Civil)	OFFICE/BRANCH/SECTION 08/Construction/ Claims, Partnering and CPM	
WORKING TITLE Claims/Scheduling Partnering Support Engineer	POSITION NUMBER 908-500-3135-420	REVISION DATE 10/16/2024

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 a Senior Transportation Engineer, the incumbent performs a variety of tasks as it relates to reviewing, evaluating, independently analyzing, developing reports, recommending determinations and provides support related to construction claims and potential claim records, alternative dispute resolution, contractor Critical Path Method (CPM) schedules and time impact analysis, CPM support in determining the number of working days, and partnering. Incumbent must possess a valid driver's license. Additionally, supports the Change Order Desk (Unit 2312) in reviewing and processing change orders and the Construction Safety unit (Unit 2337) with safety reviews and PS&E reviews. The incumbent will be assigned work based on Divisional and/or Departmental needs and could be assigned to any office within District 8, which includes San Bernardino and Riverside Counties.

CORE COMPETENCIES:

As a Transportation Engineer (Civil), 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. (Safety First, Cultivate Excellence - Innovation, Integrity)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - 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, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Pride)
- **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. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, 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. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, 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. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity)
- **Forward Thinking**: Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, 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, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Integrity, Pride)

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TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
35%	E	Provides assistance and technical support to field engineers /Resident and Construction engineers in the response and resolution of potential claim records (PCRs) and the administration of the claims process. Performs review and analysis of Contractor exceptions to the Proposed Final Estimate (PFE) and edits and/or prepares; Claims Finding reports; Review of Claims; and District Final Determination letters. Coordinate with Resident Engineers to obtain project documentation related to Contractor's PCRs, exceptions and claims. Attend claims meetings and conduct field/site reviews as required for clarification. Provide assistance to the CT legal dept. in preparation of Arbitration cases. Prepare and maintain claims and arbitration spreadsheets.
30%	E	Review of Contractor's submitted Critical Path Method (CPM) Baseline schedules, monthly update, schedules and Time Impact Analysis (TIA) schedules for contract compliance. Provides recommendations to the field engineers for acceptance or rejection of the submitted schedules. Review and analyze narrative reports. Perform independent CPM schedules and TIAs to assist with the evaluation of CO time extensions and claim analysis. Reviews and analyzes contract records for projects with delay claims. Develop CPM's for Design Unit to calculate the number of working days on major projects. Assist various units in support of CPM.
20%	E	Coordinate with the field engineers in the selection of Dispute Resolution Advisor (DRA)/ Dispute Resolution Board (DRB) member(s). Assist the RE with effective DRA /DRB presentation by organizing mock DRB / DRA hearings, provide technical support for State Position paper content and aid in effective presentation. Conduct field/site visits as required for clarification. Attend dispute meetings and hearings. Provide guidance and coordination with HQ Construction for proposed acceptance or rejection of DRB recommendations.
5%	E	Assists the field engineers in facilitator selection. Attend partnering kick-off, quarterly and partnering close-out meetings. Provide support to RE's in preparation and submission of partnering award applications. Provide partnering training. Provide assistance on policies, and procedures regarding Partnering best practices.
5%	M	Acts secretary for Division Dispute Status, Differing Site Management Review Committee meetings, and claims Department Management meeting. Provides input to Headquarters Construction related to the District's dispute resolution procedures. Perform monitoring and tracking of unit work load distribution, work products status, delivery schedules and milestones.
5%	M	Assist the Construction Safety Unit (unit 2337) and Change Order desk (Unit 2312) with various tasks including but not limiting to: Reviewing and processing Change Orders, reviewing construction projects for safety.

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

None. The incumbent may act as a lead worker and provide functional guidance/direction to the staff in the unit. In the absence of or at the direction of the unit Supervisor this may include; intake, distribution, assignment, tracking and review of incoming projects and/or work product requests.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires an independent self-motivated individual with ability to analyze special provisions, plans, estimates, regulations, and construction progress , and makes decisions and/or recommendations schedule related Contract Claims and potential claims, and schedule issues based on these factors. Incumbent must have a thorough knowledge of project delivery, scheduling, materials, safety practices, industry practice and project record keeping.

Must have an extensive knowledge of contract administration paperwork, field practices and documentation. Must have knowledge of the Construction Manual, Standard Specifications, Special Provisions, Construction related California Statutes and Departmental Policy and Procedures Bulletins.

Knowledge of: Basic principles of physics, chemistry, and mathematics as applied to civil engineering; stress analysis; mechanics; strength of materials; properties and uses of engineering materials; methods and equipment of engineering construction; engineering economics; hydrology and hydraulics.

Incumbent should have knowledge of facility design and construction, design and construction terminology, methods, materials,

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tools and equipment used in highway and bridge construction, and scheduling of work. Incumbent should also have a basic understanding of Portland cement and asphalt concrete; testing of materials; principles and practices involved in utility relocation, environmentally sensitive areas, Storm Water Pollution Prevention Plans (SWPPP) and Cal/ OSHA safety regulations. An understanding of the project development process, construction methods and practices, and plan preparation processes is required. Have knowledge of contract administration, field construction methods and procedures. A combination of Civil/Roadway and Structure construction experience will be considered.

Must be able to prepare, effectively edit and finalize reports and correspondence. Incumbent is required to have a commensurate degree of analytical skill to determine if construction claims have any validity. A moderate to high degree of analytical skill to interpret plans and specifications correctly is required. Knowledge of specialized computer application programs such as, Primavera P6 and Claim Digger are required. Additionally knowledge of computer application programs such as Micro Station, Word, Excel and Access applicable to office and field office transportation engineering work is a must.

Must have the ability to make neat and accurate mathematical calculations and engineering notes. Demonstrate the ability potential to assume journey level responsibility; organize/arrange data to produce effective work products without repetitious direction; must be able to communicate effectively with others, both verbally and in writing, and possess interpersonal skills necessary to be an effective team member.

Must have the ability to perform project management techniques such as tracking and monitoring; work load distribution; self and unit work products; delivery schedules and milestones.

Ability to read and write English at a level required for successful job performance.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in judgment and decisions by the incumbent may result in additional claims. Failure to complete claims documents timely may result in the filing for arbitration prior to the contractual administrative process for resolution being completed.

PUBLIC AND INTERNAL CONTACTS

Incumbent must be able to communicate effectively with others. The position requires close coordination and cooperation with other Construction personnel and frequent contact with Construction Management, Project Managers, Design Engineers, engineering consultants, other functional units, and Divisions. Must be able to communicate effectively with internal personnel, the contractor's personnel, partnering facilitators, DRA & DRB members, Legal representatives and arbitrators. The incumbent also may have contact with other agencies and the public. Good communicative skills are essential in carrying out the duties.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: Physical activities vary and any singular physical requirement may be for lengthy periods of time. May be required to sit and/or stand for long periods of time. Requires manual dexterity to operate computer (keyboard and video display terminal) for reviewing documents and preparation of reports and various forms. Must be able to review documents, plans and specifications in the format provided to field personnel and the contractors. Must be able to review the contract documents as they are maintained by the contract administrators. Outdoor activities require the ability to traverse across rugged terrain, hilly areas, or on uneven surfaces that are near freeways, highways, roads and construction sites. Hearing and sight are both essential to job performance because the incumbent must be able to hear directions, traffic and equipment, and must see to perform his/her duties safely. Corrected hearing is acceptable. Must be able to travel to field offices, field meeting locations and construction sites. May also travel to other District Offices and Headquarters. Incumbent must be able to travel using a car, vehicles will vary from passenger cars to 3/4 ton pickup trucks. This travel may necessitate traveling on long stretches of highway through mountains, deserts and urban areas. Some terrain may cause the jostling of the vehicle's occupant.

Mental: Requires sustained mental activity needed for report writing, problem solving, analysis and reasoning. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must have the ability to organize and prioritize large volumes of varied documents and the ability to concentrate in order to review documents and meet deadlines.

Emotional: Requires 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 be able to deal effectively with pressure, maintain focus, and intensity yet remain optimistic and persistent, even under adversity. Will consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful and treats others with respect.

WORK ENVIRONMENT

This position requires the incumbent to work both indoors and outdoors. While at their base of operation, incumbent will work in a climate-controlled office under artificial lighting. Offices may be fixed buildings or trailers. Field review locations may be in the

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metropolitan area or at remote sites in the vicinity of ongoing construction projects and on and off-highway vehicular traffic. Outside activity includes exposure to sunlight, moving traffic, loud noise, weather conditions of extreme heat and/or cold, dust, and working on uneven terrain adjacent to heavy equipment while on foot and in vehicle. May come in contact with hazardous materials, pesticides, chemicals; i.e paints, cleaners, solvents, etc. Hard hat and safety vest or approved safety shirt, acceptable footwear and other appropriate PPEs must be worn/utilized at all times in the field, no exceptions.

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