

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Executive Assistant	OFFICE/BRANCH/SECTION HQ/Audits & Investigations	
WORKING TITLE Executive Assistant	POSITION NUMBER 900-077-1728-001	EFFECTIVE DATE 05/15/2015

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the direction of the Assistant Director, the incumbent performs difficult, confidential, and responsible administrative work often involving sensitive issues, which relieves the Assistant Director of a variety of administrative and office details. The incumbent has the primary responsibility of independently handling all necessary administrative functions efficiently and expeditiously. This support requires a high degree of confidentiality, responsibility and sensitivity. Incumbent demonstrates a positive attitude and a commitment to providing quality service.

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
35% E	<p>Assist the Assistant Director through the performance of the following tasks:</p> <ul style="list-style-type: none"> Conserving the Assistant Director's time by independently handling all necessary clerical functions. Screens, redirects, or responds to visitors and telephone calls. Develop and maintain the Assistant Director's administrative, suspense, confidential, and A&I's correspondence files. Ensures the filing systems are complete and current. The filing systems may be paper, shared drives on the computer, or e-mail archives. Develop and maintain a tracking system of assignments, due dates, pending issues, etc., and use the system to develop weekly and ad hoc reports for the executive office. Use Microsoft Outlook to schedule and manage meetings, appointments, reminders, tasks, activities, deadlines, business travel, etc. Use a variety of Microsoft Office Suite software applications to type letters, memorandums, decision documents, fact sheets, agenda, legislative and Governor's referrals, organizational proposals, reports, forms, tables, spreadsheets, statistical data and other documents. Review and analyze all outgoing correspondence prepared by staff for the Assistant Director's signature. Make edits to ensure that paragraph and sentence structure, formatting, grammar, punctuation, and clarity conform to Department standards. Provide clear and responsive direction to staff on what changes are needed and why.
20% E	<p>Office Correspondence. Prepare external and internal correspondence, and maintain a log of all correspondence.</p> <ul style="list-style-type: none"> Use the Director's Office Tracking System (DOTS) to manage all A&I correspondence that is related to the Director's Office. DOTS provides work flow functionality for high priority, time sensitive task assignments, approval requests, and all related notifications. Access the system to provide summary reports. Prepare, edit, and distribute memorandum and office correspondence and reports. Maintain chronological history of all A&I documents in both hard copy and digital format.

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Update A&I templates as needed.

Be the office contact for the Assistant Director's Office.

Be the office Cal-STA Liaison, preparing weekly, bi-weekly, and monthly reports, and attending meetings as needed.

20% E Administrative duties including main reception, office mail, payroll distribution, updating the phone and route lists, shredding, maintaining RT passes, maintaining confidential employee documents, handling renewal of expiring security badges, and being the office contact for the building manager.

Other duties include maintaining key log, facilitating removal of surplus office equipment, and picking up TEC checks as needed.

Assist management when new staff are hired or leave A&I by assisting new employees with obtaining Department badges and building access cards.

20% E Provides general information, as well as information relating to A&I issues and policy. When appropriate, redirects inquires to management, or other staff members. Performs difficult, responsible, and confidential administrative work for the Assistant Director, including follow-up on confidential and general items to ensure deadlines are met; arrange correspondence for the Director in priority order; gather appropriate background material as necessary; and review correspondence referred for the Assistant Director's signature on a variety of subjects.

5% M Perform special assignments for A&I management as needed.

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.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of the principles and methods of public and business administration; office management principles, methods and procedures; and the Department's organizational structure and lines of communication and protocol.

Requires the ability to perform difficult secretarial work: compose letters, memorandums, charts, and reports independently, and from instructions; independently perform minor administrative assignments; make arithmetical computations; spell, punctuate, and use English vocabulary and grammar correctly; organize and maintain files and records; adequately respond to multiple requests for assistance in a timely and positive manner; take initiative and work independently or in a team environment; establish and maintain cooperative working relationships; follow oral and written instructions; apply good judgment and professional courtesy in all situations; and use fact, poise, and discretion in all interactions with internal and external customers.

Ability to use a variety of techniques to analyze and manage complex administrative issues; reason logically and creatively; develop and compare alternatives; draw valid conclusions; make recommendations; adopt an effective course of action; provide sound guidance to Assistant Director and management; and present analyses in an understandable, usable form using oral and written communication methods.

The incumbent must also have the ability to:

- Type at a speed of 45 minutes per minute.
- Demonstrate computer literacy through the use of Microsoft Office, Word, Excel, and Powerpoint to create letters.

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memos, tables, spreadsheets, and charts.

- Operate office equipment (i.e., computer, printer, telephone, calculator, copy machine, fax machine, scanner).
- Communicate effectively (orally and in writing) with courtesy and tact in working with all levels of staff and visitors.
- Develop and implement processes and procedures.
- Establish and maintain the confidence and cooperation of those contacted during the course of work.
- Develop and maintain a level of professional integrity to ensure that the best interest of the Division and Department are served.
- Exercise good judgment.
- Establish and maintain project priorities.
- Complete assignments in a timely and efficient manner.
- Maintain confidentiality of sensitive and confidential information, issues and assignments.
- Anticipate problems/needs and develop an appropriate course of action.
- Exercise open-mindedness, initiative, tact and flexibility.

The incumbent must possess the following General Competencies:

Analytical Thinking: Approaching a problem by using a logical, systematic, sequential approach.

Communication: Listening to others and communicating in an effective manner.

Customer Focus: Identifying and responding to current and future client needs, and providing excellent service to internal and external clients.

Ethics and Personal Credibility: Upholding ethics and personal integrity, and demonstrating trustworthiness, reliability and responsibility.

Relationship Building: Maintaining, and strengthening relationships with others inside or outside of the organization who can provide information, assistance, and support.

Teamwork: Working effectively and cooperatively with other team members to achieve common goals, and complete assignments in a group setting.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for providing administrative support to the Assistant Director and A&I Management in an accurate and timely manner. Decisions based on the information provided by the incumbent impact the effectiveness of A&I in meeting its goals and objectives. Incomplete analysis and errors in judgment may impact critical deadlines, compromise information, and may lead to strained working relations with internal and external customers, and may negatively impact the credibility and integrity of A&I. In addition, grammar, punctuation, spelling, and formatting errors lead to extraordinary re-work and delays in meeting deadlines.

PUBLIC AND INTERNAL CONTACTS

The incumbent will speak with staff at all levels of the Department, and with private industry, elected officials and their staffs, and other governmental agency representatives. The incumbent will establish and maintains cooperative working relationships with all individuals; must speak in clear and concise sentences, listen to the needs of others, give complete attention to what people say, and ask questions to understand their concerns. All contacts from the media, for any type of information, must be referred to External Affairs.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard and video display terminal.

The incumbent must have the ability to multi-task, adapt to changes in priorities, and complete tasks and projects on time, sometimes with short notice. The incumbent must be open to change and new information, and be able to adapt behavior and work methods in response to changing conditions or unexpected obstacles. Must deal effectively with pressure, maintain focus yet remain optimistic and persistent, even under adversity. Value cultural diversity and other individual differences in the workforce. Bending, stooping, and pulling may be required.

Excellent customer service is essential in this position. The incumbent must be able to develop and maintain cooperative working relationships, behave in a fair and ethical manner toward others and respond appropriately to customer issues,

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concerns and complaints.

WORK ENVIRONMENT

The work days are Monday through Friday. The work hours will be set sometime between 7:00 a.m. and 5:30 p.m. The incumbent will work in a climate-controlled environment with artificial lighting for extended periods of time. Due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Vacations may be restricted during peak times.

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