

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Executive Assistant	OFFICE/BRANCH/SECTION District 2/Administration/Executive Office	
WORKING TITLE Executive Assistant	POSITION NUMBER 902-001-1728-001	EFFECTIVE DATE 8/1/15

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 District Director, the incumbent provides administrative and secretarial support to the District Director and the District Division Chiefs, performing difficult, confidential and highly responsible work with substantial latitude for independent action and relieves the District Director of routine administrative tasks and office details. The incumbent has the primary responsibility of independently handling all necessary clerical functions efficiently and expeditiously.

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	Responsible for conserving the District Director's time by independently handling all necessary clerical functions. Work on special projects involving the Department's operations and policies. Gather and analyze detailed information from various sources on projects as assigned by the District Director. Prepares written responses or reports and recommendations. Act as liaison to the District's managerial staff at the Deputy District Director level, and as directed provides authoritative information regarding the Department's program activities, policies and procedures to other District staff. Maintain a familiarity with all the District's activities and projects in progress. Handles communications and complaints regarding the Departmental operations and personnel and contact District staff to investigate complaints and relay information to the District Director. Coordinates multiple activities of high priority requests and sensitive issues to ensure there is follow through and deadlines are met. Act as the liaison with other departments; officials from other governmental entities and local agencies; elected officials; the business community, etc.
35% E	Independently review, analyze, and prioritize all incoming correspondence to determine whether the materials should be referred to the District Director or to an appropriate staff member. Review completed work from the Divisions and incoming materials. Provide appropriate background information when necessary and ensure that the staff responsible for taking the required action follows through. Respond to the less technical requests for information on own initiative. Review all outgoing matters brought to the District Director for signature, checking for consistency with administrative policy as well as style format, grammatical construction and clarity. Maintain the District Director's confidential files along with his suspense file on correspondence and reports that are assigned to the staff and follow up to assure deadlines are met. Monitor incoming Governor's and Director's referrals and correspondences, direct them to the proper source for reply within the specific time limit, and track the preparation of responses.
10% E	Screens a variety of visitors and telephone calls from California State Transportation Agency staff; the Director; officials from other governmental entities and local agencies, elected officials; the business community; labor and members of the general public. Serve as the primary contact for the District Director during the executive's absence. Determine which calls must be personally responded to and which calls the District Director's staff can handle prior to the executive's return to the office.
5% E	Acts as a lead and resource for all District clerical staff for the Department's correspondence guidelines. Provide functional direction to the secretarial employees on formatting, organization, procedures, packaging of correspondence and other written communications. Develop and revise

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the District's procedural circulars concerning written materials. Develop and compose correspondence; update and distribute large quantities of District information, lists and materials.

- 5% E Arrange and coordinate meetings and conferences; gather and furnish all the necessary materials. Maintain an appointment calendar for the District Director. Assist in determining what staff should be included based on knowledge of meeting context and attendance of elected officials, other local agencies, citizen's groups, etc. Develop status reports and graphs/charts. Attend meetings to take notes and summarize into minutes, check on status of pending materials and gather information for future meetings. Make all travel an arrangement, which includes hotel reservations, transportation and travel itineraries. Prepare travel expense claims.
- 5% M May be required to research, provide background and non-technical information in preparation for meetings.

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. May act as a lead and resource for all District clerical staff for the Department's correspondence guidelines.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have a good knowledge of the principles of effective communication. Must have knowledge of the functional organizational characteristics of the Department, and be versed in the Department's strategic plan, goals and objectives, as well as Department policies, programs, organizational structure, and business practices.

Must be familiar with office methods, supplies and equipment, business English and correspondence.

Be able to read and write English at a level required for successful job performance, type at a minimum of 40 words per minute; perform difficult clerical work; manage and maintain technical, sensitive and confidential records; communicate effectively, orally and in writing; meet and deal tactfully with people.

Have computer experience in Microsoft Windows, Word and Excel.

Ability to multitask in a busy office environment.

Demonstrate interest in assuming increasing responsibility; possess mature judgment, loyalty, poise, 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 and maintenance of a high level of interpersonal communication skills could impact sensitive projects, affect critical deadlines, and reflect poorly on the integrity of the organization.

PUBLIC AND INTERNAL CONTACTS

Continuous and daily contact with the District Director and other members of District Executive Staff. Frequent contacts with a wide variety of individuals, including those affiliated with the Governor's office; the Legislature; State and local government; the U.S. Department of Transportation; other public and private organizations.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long periods of time using a 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. Other requirements include the ability to develop and maintain cooperative working relations; respond appropriately to difficult situations; recognize emotionally charged issues or problems and

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acknowledge the various responses. Tact and sensitivity to requests must be exercised.

WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial lighting. Incumbent may also be required to travel and work outdoors and may be exposed to dirt, noise, uneven surfaces, and/or extreme heat or cold.

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