

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Executive Assistant	OFFICE/BRANCH/SECTION District 10 Administration - Executive Services	
WORKING TITLE Executive Assistant	POSITION NUMBER	EFFECTIVE DATE 02/23/2015

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 general direction of the Chief, Executive Services Branch (an Information Officer II), the Executive Assistant (EA) provides direct administrative assistance and secretarial support to the District Director (DD). Incumbent independently performs difficult, complex, and highly responsible work. Duties include but are not limited to the following:

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
50% E	<p>Independently reviews, gathers, analyzes, prioritizes, and takes effective action in reviewing DD's incoming mail and correspondence to determine whether the materials should be handled by the DD or delegated to an appropriate staff member.</p> <p>Using required in-depth knowledge of the Department's goals, objectives, and understanding of external influences, the EA reads incoming materials from the Divisions to check for departmental required format, proper grammar, concise, understandable, accurate and appropriate content, and makes necessary corrections prior to providing to DD. Reviews all outgoing correspondence brought to the DD for signature, checking for consistency with administrative policy as well as style format, grammatical construction, and clarity, and makes necessary changes as appropriate.</p> <p>Independently reviews, analyzes, prioritizes, and takes effective action regarding the DD's email. Independently determines priority of received emails. Appropriately processes all emails with in guidelines provided by the DD, Deputy District Director of Administration, or supervisor. Brings to the attention of the DD any important, priority, or deadline emails. Tracks email due dates and responses. Reminds DD of deadlines and/or due dates as deadlines approach.</p> <p>Sets up and maintains the DD's confidential and general files along with suspense file on correspondence, reports, and due dates. Track and follows up with assigned staff to assure that deadlines are met. Daily monitors DOTS system for incoming Governor's and Director's referrals and correspondences, directs them to the proper sources for reply within the specific time limit, and tracks the preparation of responses to ensure deadline is met.</p> <p>Acts as the District's lead resource regarding the Department's correspondence guidelines. Provide functional direction on formatting, organization, procedures, packaging of correspondence, and other written communications. Develops, composes, and revises the District's procedural circulars concerning written materials. Designs, implements, and initiates procedures and forms to improve the efficiency and effectiveness of work flow.</p> <p>Independently determines if background information is needed for DD for meetings or other engagements the DD will attend. EA will research, gather, and prepare necessary material. Using own initiative, responds to the less technical requests for information. Makes judgment based on knowledge of District activities and sensitive projects.</p> <p>Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on</p>

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

time with short notice and minimal guidance.

Performs semi-professional administrative assignments for the DD which includes, but is not limited to, the independent preparation of correspondence and reports. Examples are as follows:

i.e. Put together a summary of all contacts and reaction received in the Director's Office regarding problem situation in .

i.e. Put together a summary of all contacts we've had with _____ Senators' office within the past year.

i.e. Put together a suggested reply to Headquarters from all of these comments I have received from our Deputies.

i.e. Read this report from _____ and give me a thumb-nail sketch of what it says and how it will affect us.

15% E Independently reviews DD's email continuously throughout the day and immediately processes all meeting requests as they arrive. Independently schedules meetings and makes meeting arrangements, (including securing meeting rooms) obtains reference materials, coordinates meeting and conferences; gather and furnish all necessary materials for the meeting and ensures DD has everything necessary for the meetings he attends. Responsible for maintaining the DD's appointment calendar, providing confirmation of meetings forms which include date, time, place, subject, and attendees at meetings; or advises of cancellations; prepares meeting folders which contain all necessary information including maps and reservations confirmation if applicable. Maintains calendar for Director's Conference room ensures the room is not double booked, and is maintained to present a professional image.

Attends DD's regular management staff meetings to take notes and summarize into minutes ready for posting on web sites or distribute within the same week of the meeting. Independently checks on status of pending items and materials for the meeting and independently gathers information for future meetings. Prepares draft agenda for the DD review and use.

15% E Screen a variety of visitors and telephone calls from Transportation Agency staff, the Director, officials from other governmental entities, local agencies, elected officials, the business community, labor and members of the general public. Promptly handle direct calls using thorough knowledge of District activities and projects. Personally provide the information when appropriate and refer some issues to the appropriate staff members to handle. In the DD's absence, attempt to ascertain subject matter and obtains any background information on the subject for the DD's perusal prior to returning the call. Serve as the communication link for the DD during the executive's absence. Determine which calls must be personally responded to. Handle calls when appropriate and know which calls the DD's staff can handle prior to the executive's return to the office.

Receives visitors, both with and without appointments, escorts them to the DD's office and makes necessary introductions. If the DD so desires, contacts persons whose attendance is required and/or obtains any materials he may request. In the DD's absence, ascertains from visitor the nature of his business, provides assistance or directs visitor to proper personnel for expeditious handling.

10% E Types correspondence and documents relating to disciplinary/corrective action, appraisal reports, grievances, and other confidential items emanating from any of the managers within the District, as well as routine correspondence for the DD. Prepares confidential meeting notes for the DD and, if requested, for Deputy Directors. Maintains Governor, Director, and Legislative Referral Index and assures replies are forthcoming in a timely manner.

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

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| 3% | E | Makes all travel and lodging arrangements for the DD after analyzing and determining travel needs. Gather, organize and prepare all materials require for the trip/meeting and have them ready the day before travel. Prepares DD's travel expense claims accurately and in a timely manner. |
| 3% | M | Maintains up-to-date listings of Headquarters personnel, legislators, city and county officials, and others with whom the DD has frequent contact in order to expedite his telephone calls and correspondence.

Responsible for the preparation and maintenance of the Local Agency Directory. Prepares and distributes a full update of the document in February of each year. Provides minor updates via email as often as necessary to keep district personnel up to date on the changes. |
| 2% | E | Maintains good public relations with legislators, other agencies, private citizens, and fellow employees. |
| 2% | M | Maintains the professional appearance of the DD's office at all times, and keeps necessary supplies on hand for the director's use. |

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

Normally this position does not supervise; however, the incumbent may provide functional direction to district clerical staff in regard to policy and procedures related to preparing correspondence and other clerical-related procedures.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires knowledge of modern office methods, supplies, equipment, departmental policies and procedures and a wide knowledge of vocabulary, grammar, spelling, business English and correspondence.

The incumbent must be able to reason logically and analyze situations quickly and accurately and take effective action. The incumbent must be able to multitask in a busy office environment with many interruptions from calls and visitors. EA must be able to complete assignments on time and with in budget.

Must be able to type, take minutes, read and write English at a level required for successful job performance; type at 40 words per minute; make briefs of reports and correspondence; independently prepare correspondence from oral or written instructions, and independently perform administrative assignments. Incumbent must be able to communicate effectively both orally and written; handle with courtesy and tact a wide variety of public contacts both on the telephone and in person. Must be able to analyze situations accurately and take effective action perform difficult clerical work and keep difficult records. EA must posses skills to relieve DD of clerical/administrative functions by performing these duties.

Incumbent must have knowledge of departmental activities, goals, objectives, polcies and procedures. Incumbent must have knowledge of director's vision, goals, and objectives and must support the DD to achieve them. This position requires working knowledge of all district activities and those subjects of special interest to the DD.

EA must have computer experience, knowledge and abilities. Incumbent must be proficient at Microsoft Windows, Word, Excel, Access and other computer programs such as Microsoft Outlook. Must be proficient in the use and knowledge of the department's DOTs System.

Demonstrate interest in assuming increasing responsibility; posses mature judgment, loyalty, 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.

The EA is often the first contact the public, the media, and other public employees have with Caltrans. The incumbent must use tact and good judgment in all situations and maintain confidentiality when required. Errors in any of these areas

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

will create a negative image of the district and the department.

PUBLIC AND INTERNAL CONTACTS

The incumbent will have frequent contact 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. Tact and sensitivity to request must be exercised. Must possess sensitivity and knowledge of appropriate information to release to callers or visitors.

The incumbent will have extensive daily contact with employees at all levels within the Department of Transportation as well as the general public including representatives of the legislature and other public interest groups.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a telephone, 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. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on time with short notice. Employee may be required to move medium size boxes of material and packages from one location to another and must be able to lift and carry 40 lbs.

This position requires patience, understanding, diplomacy and tact when dealing with a high volume of requests from a diverse group of people. Other requirements include 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 deal effectively with pressure in a high stress and highly visible office, maintain focus and intensity, yet remains optimistic and persistent even under adversity.

Must be able to stay mentally focused for long periods of time.

WORK ENVIRONMENT

The incumbent will be required to work within the confines of a cubicle of a climate-controlled office under artificial lighting by large windows of an office building. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Employee will primarily work in a workstation cubicle in a shared office. Core working hours will be set sometime between 8:00 a.m. and 5:00 p.m.

Employees may be required to travel within the eight counties of District 10 or infrequently statewide.

Overtime may be required and vacations may be restricted during peak periods.

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.

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE
