

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Executive Secretary	OFFICE/BRANCH/SECTION District 10 - Administration	
WORKING TITLE Executive Secretary to DDD M&O	POSITION NUMBER 910-001-1247-001	EFFECTIVE DATE 05/27/2015

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 Secretary (ES) provides direct administrative assistance and secretarial support to the Deputy District Director of Maintenance and Operations (DDD M/O) and the Deputy District Director of Planning & Local Assistance (DDD P&LA). Incumbent independently performs difficult, complex, and highly responsible clerical work. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects on time with short notice and minimal guidance. Duties include but are not limited to the following:

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup> 50% E	<p>Reviews and independently handles the DDD M/O's incoming mail and determines whether the materials should be handled by the DDD M/O or delegated and routed to appropriate senior level staff for attention. Composes and prepares routine correspondence for DDD M/O signature. Responsible for proper handling of correspondence including setting up a monitoring system to ensure a response is prepared within departmental correspondence guidelines time frames which may require follows up action with senior level staff. Develop and maintain procedures for DDD M/O to review mail that is outside of the scope of authority. ES ensures any required background material is attached to documents (if it is available) and will track correspondence on signature rounds.</p> <p>Using required knowledge of maintenance/operations activities and understanding of external influences, ES reads incoming materials from the Divisions to check for format, proper grammar, and appropriate content, and makes necessary corrections prior to providing to DDD M/O. Reviews all outgoing correspondence brought to the DDD M/O 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>Appropriately processes all emails within guidelines provided by the DDD M/O or supervisor. Brings to the attention of the DDD M/O any important, priority, or deadline emails. Tracks email due dates and responses. Reminds DDD M/O of deadlines and/or due dates as deadlines approach.</p> <p>Maintains DDD M/O appointment calendar using Microsoft Outlook. Prepares meeting folders which include date, time, place, subject, and attendees at meetings, directions and any other required information. ES independently determines if background information is needed for DDD for meetings or other engagements and will research, gather, and prepare necessary material. Advises DDD M/O of cancellations; makes arrangements for meeting room and obtains reference materials, if necessary.</p> <p>Attends DDD M/O regular 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.</p> <p>Using own initiative, responds to the less technical requests for information. Makes judgment based on knowledge of District activities and sensitive projects.</p>

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Sets up and maintains the DDD'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.

Performs administrative assignments for the DDD M/O which includes, but is not limited to, the independent preparation of correspondence and reports.

Types correspondence and documents relating to disciplinary/corrective action, appraisal reports, grievances, and other confidential items emanating from any of the senior level staff within the maintenance and operation division, as well as routine correspondence for the DDD M/O. Prepares confidential meeting notes for the DDD M/O.

20% E Answers and monitors telephone calls for the DDD M/O. Must have a thorough knowledge of maintenance and operations activities in order to direct calls for prompt handling. In the DDD M/O's absence, attempt to ascertain subject matter and obtains any background information on the subject for the DDD M/O's perusal prior to returning the call.

Screen a variety of visitors and telephone calls from officials from other governmental entities, local agencies, elected officials, the business community, labor and members of the general public. Promptly handles direct calls using thorough knowledge of maintenance and operation activities. Personally provides the information when appropriate and refers some issues to the appropriate staff members to handle. In the DDD M/O's absence, attempt to ascertain subject matter and obtains any background information on the subject for the DDD M/O's perusal prior to returning the call. Serve as the communication link for the DDD M/O during the executive's absence. Determine which calls must be personally responded to and which calls the maintenance and operations staff can handle prior to the executive's return to the office. Maintains good public relations with legislators, other agencies, private citizens, and fellow employees

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

10% E Provides support to the DDD P&LA including but not limited to: processing incoming mail, email and phone calls. ES will also schedule meetings as requested.

5% E Maintains files for the DDD M/O's use, including pending file to follow up on important deadlines, meeting dates, etc.

Maintains up-to-date listings of Headquarters personnel, legislators, city and county officials, and others with whom the DDD M/O has frequent contact in order to expedite his telephone calls and correspondence.

Maintains the appearance of the DDD M/O's office at all times, and keeps necessary supplies on hand.

5% E This position acts as a backup to answer incoming calls on the main line from the public and other state agencies in the Director's Office. Acts as backup for the secretarial staff in the District Director's Office. In this capacity types and transfers all incoming messages to the appropriate email recipients.

5% E Maintains the schedule, tracking and care of the fleet vehicles assigned to the DDD M/O and DDD P&LA.

5% M Acts as the resource to M/O and P&LA staff regarding the Department's correspondence guidelines. Provide functional direction on formatting, organization, procedures, packaging of correspondence, and other written communications.

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<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.

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## 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

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## 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. The incumbent must be able to multitask in a busy office environment.

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.

Incumbent must have knowledge of departmental activities, goals, objectives, policies and procedures. This position requires working knowledge of all district activities and those subjects of special interest to the DD.

Have computer experience, knowledge and abilities. Incumbent must be proficient at Microsoft Office.

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

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## 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 Executive Secretary 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 will create a negative image of the district and the department.

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## PUBLIC AND INTERNAL CONTACTS

The incumbent will have frequent contact with a wide variety of individuals, including those affiliated with the headquarters; 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.

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.

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## 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.

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Must deal effectively with pressure, maintain focus and intensity, yet remains optimistic and persistent even under adversity.

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

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## 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 7:30 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.

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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.)

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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)

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SUPERVISOR (Signature)

DATE

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