

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Executive Secretary I	D20/Information Technology/Executive Office	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Executive Secretary	900-170-1247-001	07/01/2015

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 District 20 Headquarters Deputy Director/Chief Information Officer (CIO) in the Information Technology (IT) Division, the incumbent, working at an advanced journeyman level, independently performs routine and non-routine administrative and office management in support of the Division such as maintaining the CIO's working schedule and calendar, researching confidential and/or sensitive issues for the CIO and relieving the CIO from administrative tasks and functions. Incumbent will assist the CIO with difficult and/or sensitive program issues that require the incumbent to exercise a high degree of initiative, tact, and the ability to act independently in anticipating problems and/or needs. This position is expected to continually enhance our customer's experience by implementing, utilizing and monitoring proven customer service practices. Typical tasks include, but are not limited to the following:

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
35% E	Independently creates, maintains, reviews, organizes and prioritizes incoming correspondence, reports, documents and legislative/media responses including confidential and/or sensitive material for the CIO to determine whether the material should be reviewed by the CIO, referred directly to other Division personnel or delegated to an appropriate Manager. Provides appropriate background material for reference, indicates action(s) to be taken, assigns due dates and develops and maintains an internal tracking system to follow up on projects and assignments delegated to others to ensure deadlines are met in a timely fashion. Sets up and maintains a filing system for the CIO including confidential and administrative files. Updates/purges files per the record retention schedule and prepares files for archiving, processing the required documentation to ensure compliance with the Division's record retention schedule.
	Works with the Director's Office Executive Assistants for correspondence issued through the Director's Office Tracking System (DOTS) and is responsible for tracking, monitoring and evaluating the progress and completion of all CIO assignments.
30% E	Independently researches, examines and compiles factual data and prepares written responses for the CIO's signature on a wide range of subjects requiring a thorough and detailed knowledge of Departmental current issues and organizational policies and procedures. Researches a broad spectrum of issues, including confidential and/or sensitive issues, extracts information from various sources and compiles into written reports, charts and graphs for review by the CIO. Determines priority level of documentation based upon knowledge of current Program issues. Assists in interpreting Departmental policies to operating Divisions, Programs and Districts including reviewing incoming inquiries from Executive staff, legislators, media, public inquiries, etc., and assigning to appropriate staff members for reply.
20% E	The incumbent is responsible for scheduling meetings, screening incoming mail and referring to appropriate staff for response, screening telephone calls (including local partners, officials from other governmental entities, etc.) and visitors, composing and typing correspondence, and reviewing correspondence prepared by other Managers within the Executive Office for compliance with policies and procedures. When appropriate, provides requested information or refers inquiries to the appropriate staff for reply when the CIO is not available.

**ADA Notice**

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Ensures the CIO's priorities are appropriately reflected in his/her calendar. On a daily basis, examines the CIO's calendar and provides the CIO with an itinerary of the day's activities and scheduled meetings. Maintains communication so the CIO is notified of all changes to their schedule and has relevant documents and briefing memos prior to meetings. Briefs the CIO on actions taken during their absence. Sets up meetings utilizing video teleconferencing where applicable and ensures documents, reports, and/or issue files required for meetings are available based upon knowledge of subject matter. Attends meetings and conferences, takes and/or summarizes notes into minutes and distributes minutes.

- 10% M Consolidates reports as necessary from each IT office into a single document for CIO review. Coordinates purchase requisitions and contracts for the Division, and prepares them for CIO review and approval. Arranges transportation and hotel accommodations for CIO divisional travel. Compiles travel expense claims for the CIO.
- 5% M Coordinates confidential human resource documentation for the Division and prepares them for CIO review and approval. Scans documentation and forwards to the next step in the process. Tracks time off on calendar of the CIO's direct reports. Provides assistance to the Director's office when they are short-handed or need extra assistance with larger Caltrans events.

<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

None - May provide general direction to other clerical support staff regarding correspondence to ensure preparation is in accordance with accepted Caltrans standards, procedures and deadlines.

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

#### KNOWLEDGE

A demonstrated interest in assuming increasing responsibility, displays mature judgement, loyalty, poise, tack, and discretion are essential requirements for this position. Knowledge of principles, practices and methods of public and business administration, including organization and personnel and fiscal management. Must possess and demonstrate office management principles, methods, and procedures, administrative survey techniques and skill in their application. Thorough understanding of the Information Technology (IT) organization, its functions in relationship to the Department's mission and objectives under which IT operates and the CIO's role in the organization.

#### ABILITIES

The incumbent must have outstanding customer service skills. Must be able to recognize when confidentiality is required and be able to maintain such confidentiality whether it be correspondence and/or information that comes through the incumbents desk. Proficiency with computer programs such as Microsoft Word, Excel, and PowerPoint. Strong knowledge of MS Outlook and other forms of electronic mail. Establishes and maintains cooperative working relationships and completes assignments without detailed instructions. Must speak and write effectively, works independently, prioritizes work assignments and meets deadlines. Excellent grammatical skills and the ability to spell correctly and possesses excellent oral and written communication skills. Must be able to use a personal computer and other forms of media (i.e., videoconferencing; conference telephones, etc.) Self initiative and paying close attention to details are imperative.

Must have the ability to lead others, to independently develop procedures and prepares correspondence utilizing a wide knowledge of vocabulary, grammar, spelling and formatting skills.

#### ANALYTICAL

Must understand statistical and research methods. Must think clearly, quickly and analyze and solve problems of the organization and management. Possesses the ability to analyze data, make sound conclusions, sorts data and compiles reports.

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## RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for ensuring confidentiality of material, making judgmental decisions in determining appropriateness of response to inquiries/complaints, referring callers and correspondence to appropriate staff based on knowledge of organization and Department, and completing assignments within established deadlines. Mistakes could cause delays in taking appropriate action and claims against the State could create a poor public image and the image of the CIO. Errors in judgment and/or poor communication skills by the employee may result in conflicts of meetings, missed commitments and deadlines by the CIO. Such errors will adversely impact the CIO's ability to carry out their projects effectively, and/or the ability to provide the high level of service that IT is expected to provide to its internal and external customers.

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## PUBLIC AND INTERNAL CONTACTS

The incumbent has a wide variety of public contacts with individuals, private industry, elected officials and their staff, and other governmental agency representatives. These contacts require exercising tact and sensitivity in responding with requests. Internal contacts occur regularly within all levels of Caltrans.

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## PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone. Requires occasional bending, stooping and kneeling. Additionally, the incumbent should be able to value cultural diversity and other individual differences in the workplace. Must adjust rapidly to new situations warranting attention and resolution and be open to changes and new information. Adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Considers and responds appropriately to the needs, feelings, and capabilities of different situations. Be tactful and treat others with respect. Must be able to multi-task, adapt to changes in priorities, and completes tasks or projects with short notice. Mentally adaptable to constant changes in priorities, calendars, travel, and assignments. Professional demeanor and flexibility in the face of frequent changes.

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## WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial lighting using a personal computer. Incumbent may be required to travel in-state but travel will be infrequent. The incumbent will work in a work area with shared cubicles.

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

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