

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE BRANCH/SECTION	
Office Technician (General)	District 1 - Transportation Planning	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Planning Administrative Liaison	901-800-1138-001	

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 supervision of the Chief, Local Assistance (a Senior Transportation Engineer), the incumbent assists District 1 Planning Management in processing and complying with general office administrative requirements and procedures. Incumbent is responsible for various office work such as purchasing, data entry, minute taking, work space setup, and training coordination.

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
45%	E	Responsible for the effective and efficient communications with external and internal agencies for the Advance Planning (PID's), Planning and Local Assistance staff. Maintain and update contact databases in Excel. Assist with reports for PID workloads, track expenditures, make copies and organize electronic filing system. Using Word and Adobe, prepare drafts and final correspondence for staff. Draft reports and other planning products for supervisors and other staff: including letters, memos, meeting notes, technical documents; transmits and distributes materials when requested (including faxes, and mail merge). Coordinate internal and external meetings, training, webinars, workshops and other planning activities. Set up meetings to discuss work activities for PID work. Assist in maintaining new content for the District 1 Planning website and other electronic communications tools.
25%	E	Assist in preparing Purchase Requests and ensuring items purchased are received and payments made promptly and in accordance with Department policies, procedures and regulations. Utilize variety of tools, including computer spreadsheets and paper records to maintain Planning and Advance Planning (PID's) purchase requests file, and reconcile VISA/CALCARD statements. Provide support to the Advance Planning (PID's), Planning and Local Assistance staff in maintaining an inventory of office supplies and equipment needs. Track office & computer equipment and assist IT in basic work space setups.
20%	E	Provide support to staff in travel coordination: coordinate calendars, prepare travel expense claims (TEC) and other documents in accordance with Department policies, procedures and regulations for Deputy and other Planning and Local Assistance staff including Advance Planning (PID's).
5%	E	Assist in coordinating meetings for the Planning and Advance Planning (PID's) staff. Attend training and meetings as needed. Assist Planning staff with public meeting setup and preparation, as well as attend the meetings in a support role as needed taking minutes and providing equipment set up.
5%	M	Assist with the hiring process for new Planning and Advance Planning (PID's) staff and communicate with applicants during this process. Assist in the preparation of Position Action Request Forms (PARF). Attend to new staff requirements and aid in the transition of new personnel.

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For information, call (916) 445-1233, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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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 modern office methods, forms and equipment; organization and functions of the department.

Must have general knowledge of department and regional goals and policies and have the ability to provide direction in accomplishing them. Must possess the ability to read and write English at a level required for successful job performance; communicate effectively with internal and external customers; and operate various office equipment including mailing machines and computers. Incumbent must be able to follow verbal and written directions, evaluate situations accurately and take effective action; apply rules and office policies and procedures; exercise a high degree of initiative and independent thinking in performing assigned tasks, good judgment, ability to locate and utilize appropriate resources and ability to prioritize workload and manage multiple tasks while completing assigned tasks accurately and on time. Ability to develop and maintain a positive working relationship with others.

Must have a working knowledge of computer applications and software, including but not limited to: Microsoft Windows, Excel, Word, and Outlook.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Failure to do job successfully could result in a significant loss of funding for the department or agencies with whom we work.

PUBLIC AND INTERNAL CONTACTS

Contact with District and headquarter personnel.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for extended periods of time using a personal computer and while attending meetings. Employee must be congenial and tactful when dealing with others and must be able to develop and maintain cooperative working relationships. Must be self-motivated and be able to multitask, adapt to changes in priorities and complete tasks or projects with short notice. Travel may be required.

WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial lighting. The incumbent may be required to travel, to work outdoors and to be exposed to dirt, noises, 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

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE