

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Executive Assistant	OFFICE/BRANCH/SECTION Director's Office of Equity & Tribal Affairs	
WORKING TITLE Executive Assistant	POSITION NUMBER 900-074-1728-921	REVISION DATE 08/28/2024

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under direction of the Deputy Director for the Director's Office of Equity & Tribal Affairs (DETA), the Executive Assistant performs a variety of tasks to provide administrative assistance and secretarial support in order to alleviate administrative detail for the Deputy Director. The Executive Assistant will serve to increase the capacity of the Deputy by assisting in carrying out the administrative duties and responsibilities aligned with the Division. The Executive Assistant will coordinate the office environment of the Deputy Director and will provide administrative support to DETA staff.

CORE COMPETENCIES:

As an Executive Assistant, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Reliability**: Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Problem-solving and Decision-making** : Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Organizational Awareness**: Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Planning and Results Oriented**: Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
40%	E	Assist in interpreting departmental policies and reviewing and prioritizing correspondence to determine whether the material should be referred to the Deputy, to the appropriate Branch Manager, or take independent action. Review and compile data and/or correspondence to submit to the Deputy Director. Gather and organize documentation and reports for the Deputy and staff to provide information in which they can provide direction on policy, operating programs, and/or procedures. Serve as the assistant coordinator to the DETA Management Team on matters pertaining to priority projects and issues crossing functional or program lines.
30%	E	Maintain and update a log of direct mail or items for action in the Director's office tracking system or other tracking systems; distribute referrals/assignments to other divisions or districts; and review correspondence prepared for Deputy's signature for accuracy and conformance with departmental procedures and policies. Gather and furnish background material for meetings and reports and prepare manuals. Track, monitor, and send follow-up requests on projects and efforts assigned to DETA. Submit weekly, monthly and/or quarterly project reports as required using appropriate computer applications. Review data to determine the level of confidentiality required. Provide assistance and follow-up on projects as assigned. Assist in finalizing project assignments by compiling data, routing for signatures, and closing out final administrative or secretarial tasks.
25%	E	Schedule and maintain the appointment calendar for the Deputy as necessary. Schedule, arrange, and coordinate meetings and conferences; make travel arrangements and complete travel expense claims; and record meeting activities and track all action items stemming from the meetings. Dictate correspondence and maintain the office filing system for the Deputy and DETA, which includes setting up and purging files if necessary. Assist and monitor various reports for the DETA Management Team, including, but not limited to, project workload reports, training reports, staffing plans, and organizational charts. Track and monitor the DETA's job related and mandated trainings for compliance. Attend and participate in staff meetings and related efforts to improve the operational efficiency of the administrative processes. Receive and screen incoming telephone calls and emails and distributes them to the appropriate person.
5%	M	Answer correspondence sent to the Deputy's or DETA Management's attention. The incumbent may serve as a representative of the office, such as in meetings or conferences. May facilitate the work of office staff. Perform other related duties within scope of the classification as assigned to support the Deputy and DETA staff.

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

This position does not supervise. May provide general guidance to clerical support staff regarding correspondence to ensure the preparation is in accordance with accepted Caltrans standards, procedures and deadlines.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of departmental activities, goals and objectives, policy and procedures, Caltrans organization and sensitive issues. The ability to work effectively and independently; to learn and use a variety of computer software programs in performing duties. Shows initiative and adapts to a variety of situations; ability to think clearly and quickly analyze and solve problems of organization and management. A thorough understanding of the Department's organizational structure and the relationships between various functions in Headquarters and the Districts and be knowledgeable of the Department's mission, vision, goals, and programs. The ability to analyze data, produce reports and be computer literate using Microsoft Office Tools, Intranet, Internet, etc. Excellent oral and written communication skills. The ability to effectively coordinate and communicate in a timely and effective manner both in person and through written and oral communication. The ability to develop and maintain effective working relationships, work cooperatively with others and to respond to inquiries from Caltrans management and internal and external customers. The ability to independently analyze, summarize, and brief management on issues. Strong critical analysis skills and the ability to guide executive support staff at all levels through complex, sensitive issues. The ability to assimilate and

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evaluate input from various sources, develop alternative courses of action and make objective recommendations. The ability to develop cooperative working relationships, reason logically and creatively and utilize a variety of analytical techniques to resolve complex issues. The ability to work with minimum direction and supervision, to initiate action independently and handle multiple assignments simultaneously.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Responsible for ensuring confidentiality of material; makes judgmental decisions in determining appropriateness of a response to inquiries/complaints and in referring callers and correspondence to appropriate action, claims against the state and could create a poor public image for the department. Actions at this level affect the Department and the Director's image and the ability to produce desired results. Errors, lack of timeliness, or inadequate preparation could have a significant impact on the internal and external operations of the Department.

PUBLIC AND INTERNAL CONTACTS

A wide variety of contacts with individuals, private industry, elected officials and their staff, other governmental agency representatives (including officials from the business community, other governmental entities, California State Transportation Agency staff and the Governor's office). These contacts require exercising tact and sensitivity in responding with requests. Internal contacts occur regularly with all levels within Caltrans.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The ability to exhibit professionalism and self-assurance in the middle of fast-paced and sometimes chaotic conditions. The ability and aptitude to utilize a personal computer to update, retrieve, and analyze information. The incumbent may be required to sit for long periods of time using a keyboard/mouse and video display monitor, or while attending meetings.

The ability to effectively coordinate multiple assignments with concurrent due dates. The workload is subject to frequent, substantial and unexpected changes that could affect the scheduling or completion of assignments. The ability to develop and maintain cooperative, collaborative working relationships and recognize emotionally charged and/or sensitive issues and problems and handle them effectively and appropriately. The ability to multi-task, adapt to changing priorities, and complete tasks or projects with short notice. The ability to deal effectively with pressure, maintain focus and intensity yet remain optimistic and persistent, even under adversity.

The ability to communicate effectively, both orally and through written correspondence, with staff at all levels within the Department, and other internal/external customers in a timely and effective manner. The ability to make oral presentation and competently represent the Department with internal and external stakeholders.

The ability to remain flexible and adaptable to changing priorities. The ability to be open to change, grasp the essence of new information, and have the ability to adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles. The ability to develop and maintain cooperative, collaborative working relationships and recognize emotionally charged and/or sensitive issues/problems and handle them effectively and appropriately.

The ability to remain fair and ethical towards others and demonstrate a sense of responsibility and commitment to public service. Value cultural diversity and other individual differences in the workforce and ensures that the organization builds on these differences and that all employees are treated fairly and equitably.

WORK ENVIRONMENT

The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

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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.)

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