

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Office Technician (Typing)	OFFICE/BRANCH/SECTION District 8/Division of Traffic Operations	
WORKING TITLE Executive Assistant	POSITION NUMBER 908-350-1139-001	REVISION DATE 07/23/2024

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 the direction of the Division Budget and Administration Manager, a Staff Services Manager I, the Executive Assistant is responsible for performing complex clerical duties in support of the division, managerial team, and executive management. The incumbent is responsible for providing regular detailed public contact that may be sensitive in nature, and independent origination of correspondence involving knowledge and application of detailed regulations, policies, and procedures. Additionally, the incumbent is expected to exercise good judgment and communicate clearly and effectively. The incumbent must demonstrate a positive attitude and a commitment to providing accurate, timely, and high-level customer service to all internal and external customers while maintaining complete confidentiality.

**CORE COMPETENCIES:**

As an Office Technician (Typing), 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Interpersonal Effectiveness** : Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity)
- **Computer literacy and application**: Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity)

**TYPICAL DUTIES:**

Percentage                      Job Description  
Essential (E)/Marginal (M)<sup>1</sup>

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45%	E	The Executive Assistant is responsible for screening visitors and telephone calls and routing to the appropriate division. Schedules and arranges meetings, prepares agendas, and schedules appointments for the deputy and division management. Manages the Deputy District Director of Traffic Operation's calendar and provides a daily itinerary of activities and communicates with the deputy so that timely and accurate notification is given regarding schedule changes. Responsible for taking accurate meeting minutes, as requested, and typing summary reports. Responsible for maintaining a confidential filing system for the deputy. Makes all travel arrangements (i.e., transportation and hotel accommodations) for the deputy and prepares travel expense claims. The Executive Assistant is responsible for preparing, reviewing, editing, and typing correspondence and developing tables, charts, graphs, and reports in support of the Division of Traffic Operations and the district's executive team. Responsible for setting up original form letters, developing complex forms and reports, composing, proofreading, and typing letters, memos, and reports, and preparing statistical charts, tables, graphs, and reports using various data sources. Prepares all correspondence and reports following established rules, regulations, guidelines, and procedures. Organizes, reviews, monitors, and tracks all documents received and provides technical editing of all correspondence that requires executive-level signature. Coordinates, reviews, monitors, and tracks division and district audit requests for the Deputy District Director of Traffic Operations (Deputy), and reviews, proofreads and edits, and types draft responses received from the deputy for various program areas (i.e., district, Human Resources, Audits and Investigations, Health and Safety Management Services, Labor Relations).
35%	E	The Executive Assistant is responsible for purchases, including but not limited to Traffic Management Safety materials, equipment and office supplies for the Division of Traffic Operations, including reconciling purchases. Researches purchase needs for the Division, makes recommendations and finds alternative vendors and products to ensure cost effectiveness and correct product specifications. Ensure that all documentation is correct and submitted to Accounts Payable. Reviews Cal-Card Program Guidelines to ensure proper usage and ensure monetary limits are not exceeded. Solicits bids and awards purchase or repair orders for items needed for the Division.
10%	E	The Executive Assistant is responsible for keeping current records of division employees and maintaining a confidential emergency contact list for division management. Prepares monthly division employee roster and maintains the district's telephone log. Monitors mail received for the deputy and routes accordingly. Works closely with the Executive Liaison to provide clerical support coverage to the executive team. Responsible for making sure that all administrative records are stored in compliance with current records retention policies and as appropriate purges documents. Provides clerical assistance to other functional units within the Division as needed.
10%	M	Back-up, as needed, to administration tasks for the Encroachment Permit Unit. This includes processing mail, logging and date stamping all incoming correspondence; processing and scanning emails, mailing submittals, typing correspondence for the Encroachment Permit Unit; preparing letters for the release of payment and performance bonds to the surety companies and the permittee; transmits progress and final billings to Headquarters Accounting for invoicing or processing refunds; organizing, processing, and packaging closed-out permits to be picked up by vendor for microfilming.

<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.

**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

None

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of modern office methods, supplies and equipment; business English and correspondence; principles of effective training; the department's mission, vision, and strategic goals, and how the district's goals align with the department; thorough knowledge and understanding of developing effective partnerships; thorough knowledge of departmental directives and policies, governmental functions and organization at the state and local level; working knowledge of commonly used software programs and applications (i.e., Microsoft Word, Excel, Power Point, Outlook, etc.); and effective communication.

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Ability to perform difficult clerical work, including the ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations and take effective action; read and write English at a level required for successful job performance; make clear and comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar, spelling, and punctuation; and communicate effectively.

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**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Must be able to make decisions using good judgment that will reflect positively for the district and the department; develop and provide alternative solutions to complex problems; establish good working relationships with district and headquarters staff who are key to the success of the district. Poor decisions could result in ineffective decisions and solutions for the district and/or department that are inconsistent with local, state, and federal rules and regulations; loss of an employee's time and/or compensation; assessment of penalties and/or fines resulting in monetary loss to the state; compromise the district's position in legal claims and/or lawsuits, and damage the district's credibility with internal and external partners.

The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employee's confidential information, including but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the department's reputation as a secure and confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

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**PUBLIC AND INTERNAL CONTACTS**

The Executive Assistant must be able to communicate clearly and concisely, verbally and in writing, with all levels (i.e., employees, supervisors, managers, and executive level staff) within the district office location. The incumbent also interacts with staff in various headquarters programs, as well as the public, local agencies, other state agencies, transportation partners, and elected officials. The incumbent is expected to develop and maintain good working relationships and deliver quality customer service all internal and external customers.

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**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

The incumbent must be able to use a computer and various computer programs in the day-to-day execution of job duties, and sit for prolonged periods of time. Must have the ability to organize and prioritize workloads under extreme deadline situations. Must be able to develop and maintain cooperative working relationships with all levels of staff and provide quality customer service. Must be open to change and new, creative, and innovative methods of completing work, and be able to adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles, as well as create a work environment that encourages creative thinking and innovation. Must be able to sustain mental activity required for problem solving, reasoning, and decision making, and perform completed staff work. Must be able to recognize emotionally charged issues, problems, or difficult situations and respond appropriately, tactfully, professionally, and maintain complete confidentiality. Must understand the importance of excellent customer service and be willing to develop excellent partnerships with employees, supervisors, managers, and executive level staff. If necessary, must be willing to travel as necessary to other work locations within the district boundaries, other district offices, and headquarters, which may require working outside regular work hours.

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**WORK ENVIRONMENT**

While at the base of operation, the incumbent will work in a climate-controlled office with natural and artificial lighting, and may experience periodic episodes with the office temperature, as the result of fluctuating building temperatures. Incumbent may also be required to travel to and from field office locations throughout the district, including other district office locations, headquarters, and throughout the state. As part of routine job duties and oversight of the district's external affairs program, may be required to work outdoors where s/he may be exposed to dirt, noise, uneven surfaces, and/or extreme cold or heat.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. Employees may be required to conduct business travel on behalf of the Department or commute to the assigned Headquarters location. Business

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travel reimbursements consider an employee's designated Headquarters location, primary residence, and may be subject to California Department of Human Resources regulations or applicable bargaining unit contract provisions. All commute expenses to the Headquarters location will be the responsibility of the employee.

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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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