

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

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| CLASSIFICATION TITLE Administrative Assistant I | OFFICE/BRANCH/SECTION Administration | |
| WORKING TITLE Administrative Assistant | POSITION NUMBER 702-001-5361-002 | REVISION DATE 08/21/2024 |

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 joint direction of the Deputy Director, Administration and the Chief of Staff, Administration, the Administrative Assistant (AA) performs a variety of administrative tasks and handles highly-sensitive work, requiring tact, initiative, diplomacy, and confidentiality. The incumbent is expected to provide clear and concise business communications, maintain a high level of organized attention to details, effectively use business productivity tools, and provide excellent customer service and follow through. The Administrative Assistant is required to maintain knowledge of the Department's operational and organizational structure and an awareness of current issues.

CORE COMPETENCIES:

As an Administrative Assistant I, 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 - Innovation)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Innovation, Integrity)
- **Ethics and Integrity**: Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Cultivate Excellence - Equity, Integrity)
- **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, Innovation, Integrity, Pride)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - 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. (Cultivate Excellence - Engagement, 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 - Engagement, Integrity, Pride)
- **Organizational Skills**: Keeps work prioritized and organized. Logically approaches situations. (Cultivate Excellence - Engagement, Integrity, Pride)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

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| 30% | E | <p>Calendar-Related Duties: Responsible for maintaining the Deputy Director's appointment calendar. Processes all meeting requests as they arrive, providing confirmation of attendance, date, time, place, subject, and attendees at meetings; and advises of cancellations. Maintains communication so that the Deputy Director is notified of all changes to the schedule and has all necessary documents and briefing memos prior to meetings. Records accurate meeting minutes and notes, as appropriate. Ensures meeting conference rooms are available for the date and time and are prepared/set-up to present in a professional manner. May attend regular staff meetings to take notes and summarize information into minutes and relevant action items when requested. Independently checks on the status of pending items and proactively gathers information for future meetings.</p> <p>Alerts the Deputy Director's attention all high priority emails and deadlines. Tracks email due dates and responses. Manages tasks by setting reminders for deadlines and due dates to ensure they are met. Oversees the day-to-day administrative and operational functions of the executive.</p> <p>Manages, coordinates, and processes event registrations; prepares and processes travel requests and Travel Expense Claims.</p> <p>Independently arranges documents for all meetings, transportation, and itineraries for the Deputy Director. Briefs the Deputy Director on actions taken during the Deputy's absence.</p> |
| 30% | E | <p>Document-Related Duties: Prioritizes materials for the Deputy Director's personal reply with appropriate background information. The AA consults with executive staff, including the Deputy Director, District Directors, Division Chiefs, and other program partners. Researches and coordinates reports including compiling factual data to provide non-technical correspondence or reports for the Deputy Director's signature. Personally prepares, reviews, and finalizes correspondence and documents ensuring correct grammar, spelling, and format. Reviews all outgoing correspondence prepared by other staff for the Deputy Director or executive staff signatures. Analyzes documents to ensure consistency with policies. Maintains confidentiality.</p> <p>Provides weekly management information reports, including Weekly Status Reports and Week Ahead Reports. Ensures responses to inquiries are accurate and consistent, protects the integrity of information released, and ensures the quality of service provided is courteous and professional. Screens telephone calls and other requests for the Deputy Director and directs people to the appropriate staff. Prepares manuals, policies, and procedures for Administration. Studies proposed administrative changes and advises the Deputy Director of possible effects to processes.</p> <p>Reviews all outgoing correspondence for signature, checking for consistency with administrative policy as well as style format, grammatical construction, clarity, and necessary changes as appropriate. Must have the ability to multi-task, adapt to changes in priorities in a fast-paced environment and complete tasks or projects on time with short notice and minimal guidance.</p> <p>Provides backup support to other executive administrative staff members.</p> <p>Ensures Administration Program intranet web pages are updated and maintained.</p> <p>Assists staff with any appropriate miscellaneous tasks.</p> |

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| 30% | E | <p>Director's Office Tracking System (DOTs): Independently organizes, reviews, monitors, and tracks all documents received for the Deputy Director and determines whether the materials should be handled by the Deputy Director or delegated and routed to appropriate senior-level staff for attention. The incumbent provides a wide range of high-level administrative services and regularly communicates with Caltrans Executive-level management, district managers and supervisors, private and public groups, and the general public.</p> <p>Develops, administers, and maintains a comprehensive Director's Office Tracking System (DOTS) project management tracking system to ensure that deadlines and audit practices are followed, and departmental, Agency, and Governor's Office policies and goals are met.</p> <p>Tracks, monitors, and evaluates the progress and completion of those assignments. Monitors the mail log database to determine the timeliness and accuracy of responses.</p> <p>Coordinates Statewide Policy Review and approval process, and routes items through the Director's Office Tracking System (DOTS). Ensures Deputy Directives and Director's Policies are posted in a timely manner.</p> |
| 5% | M | Ensures business needs for the Administration Executive Unit are met. Provides support for the mail room, ordering office supplies, and miscellaneous travel needs. Schedules regular staff meeting for Administration Support Staff and attends to other administrative needs of the team and other duties as required. |
| 5% | M | Special projects as needed in support of Administration Program, senior staff, and serves as a subject matter expert. |

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

Relationships: Demonstrates consistent, excellent interactions with people and is customer service oriented. Communication skills: Ability to communicate clearly and effectively, verbally and in writing. Organizational awareness: Understands and adheres to Caltrans policies. Aligns efforts and performance to the Caltrans strategic plan. Acquires a strong understanding of Caltrans' organizational structure and functions. Demonstrates strong ethical values in all decisions and practices.

Research: knowledge of quantitative and qualitative research design and methodology, business terms and concepts, data analytics and interpretation. Technical proficiency: ability to use technology effectively to complete tasks

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for providing timely clear and concise communication that directly affects administrative decision making in the Caltrans Administration Program and statewide Caltrans functions. Errors could result in public, legislative, or media scrutiny, and/or loss of funds. The incumbent is responsible for complying with all applicable policies and demonstrating good judgment and discretion in all matters.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work directly with Caltrans executives in all districts and program areas and communicate with all levels of Department staff. The incumbent will also communicate with control and peer agencies as well as contractors as needed. All contacts require tact and sensitivity.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: The incumbent may be required to sit for long periods of time using a keyboard and video display terminal.

Mental: The incumbent must be able to read and understand a variety of technical documents. Must have the ability to multi-task, adapt to changes in priorities, and assist in the production of completed staff work.

Emotional: The incumbent must be customer service oriented due to the opportunity for interaction with people at all levels within the organization. It is very important that the incumbent possesses the ability to work with others in a positive and cooperative manner.

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WORK ENVIRONMENT

The incumbent will work in a climate-controlled office setting with artificial lighting. The incumbent may occasionally take transportation (car, light rail, bike, walk, or other mode of locomotion) to other facilities for meetings. May have ability to telework.

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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

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