

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Executive Assistant	OFFICE/BRANCH/SECTION Division of Transportation Planning	
WORKING TITLE Executive Assistant	POSITION NUMBER 900-074-1728-004	REVISION DATE 10/06/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the direction of the Chief, Division of Transportation Planning (DOTP), the Executive Assistant provides staff and administrative assistance and secretarial support. The incumbent researches information, gathers and reviews materials, drafts correspondence, and schedules meetings and travel.

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. (Employee Excellence - Innovation, Integrity, Stewardship)
- Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - 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. (Employee Excellence - 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. (Employee Excellence - Innovation, Integrity)
- Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - Collaboration)
- 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. (Employee Excellence - Integrity)
- 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. (Employee Excellence - Collaboration, Stewardship)
- 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. (Employee Excellence - Innovation, Integrity)
- 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. (Employee Excellence - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
50% E	Reviews, organizes, and prioritizes office correspondence to determine whether the material should be referred to the Division Chief, Deputy District Director, to the appropriate Deputy Division Chief, or take independent action. Performs research, gathers materials and then reviews, summarizes, and compiles data, briefing reports and correspondence for review by the Division Chief. Prepares, gathers, and organizes documentation and drafts correspondence for review by the Division Chief and staff.

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20%	E	Prioritizes material for the Division Chief's personal reply, ensuring the appropriate background information is attached for reference. Maintains and updates a log of direct mail or items for action in the Division Chief's office tracking system, distributes referrals/assignments to the division staff or districts. Reviews outgoing correspondence and documents prepared for the Division Chief, Deputy Division Chief and District Deputy Director signature to ensure consistency with administrative policy. Provides general direction to the division's clerical support regarding correspondence to ensure preparation of documents is in accordance with accepted Caltrans standard, procedures and deadlines.
20%	E	Schedules and maintains the Division Chief calendar. Arranges and coordinate meetings and conferences, confirms attendance, develops, prepares, distributes agendas, and reserves sites and accommodations. Makes travel arrangements and completes travel expense claims. Gathers and furnishes background material for meetings and reports and determines/assembles necessary materials for meetings. Arranges documents for all meetings, takes and/or summarizes notes into minutes, and distributes minutes. Prepares transportation and itineraries for the Division Chief. Provides the Division Chief with an itinerary of the day's activities and scheduled meetings and maintains communication to ensure the Division Chief is notified of all changes to the schedule, documents, or briefing memos prior to meetings. Assists in ensuring the Division Chief remains apprised of all current Departmental issues. Briefs the Division Chief on actions taken during their absence.
5%	E	Receives and screens telephone calls and visitors, including officials from the business community, other governmental and private entities, Agency staff, and the Governor's Office. When appropriate, personally provides the requested information, or when the Division Chief is unavailable, refers calls to appropriate functional or district staff. Relieves the Division Chief of routine and non-routine office and administrative details. Maintains confidential and administrative records.
5%	M	Performs other job-related duties within the scope of the classification as assigned.

<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. General direction is provided to the division's clerical support regarding correspondence to ensure preparation is in accordance with accepted Caltrans standard, procedures and deadlines.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of: Department's organization, activities, goals, policies and procedures. The incumbent must have knowledge of the principles, problems and methods of public and business administration. Requires knowledge of departmental activities, goals and objectives, policy and procedures the Caltrans organization and sensitive issues.

Ability to: Think clearly, quickly, logically and creatively to analyze and solve problems of organizational and management issues. The incumbent must be able to establish and maintain cooperative working relationships; carry out assignments without detail instruction; and speak/write effectively. Must be able to compose clear concise correspondence, reports, and technical documents, including correct formatting, typing and proofreading of documents. The incumbent must communicate professionally and tactfully with individuals. Must behave in a fair and ethical manner toward others and demonstrate a sense of responsibility and commitment to public service. The incumbent must have the ability to multi-task; must be able to use good judgment in organizing and prioritizing workload to ensure deadlines are met. Must be able to identify requests for information and direct those requests to the appropriate parties for responses and or resolution. Must be able to maintain a high level of confidentiality.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Actions at this level affect the District's and the Department's image and the ability to produce desired results. Good judgment, tact, and the ability to communicate effectively are expected of the incumbent. Errors may have a significant impact on the internal and external operations of the District and the Department.

**PUBLIC AND INTERNAL CONTACTS**

The incumbent must maintain an effective working relationship with Headquarters, Districts, and the public. This includes external entities, (Federal and other State agencies as well as vendors) regarding questions or concerns related to sensitive timelines of project schedules and milestones. This position often consults with planning programs, administrative service centers, Personnel, Safety, Labor Relations, Accounting, Director's Office, Business Management, Training, Computer Systems, Contracts Office, Audits, General Services, and other internal and external programs. Some travel is required.

**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

This position requires a person to be able to organize and prioritize documents; to develop and maintain cooperative working

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relationships; to concentrate in order to review and create documents. Requires occasional bending, stooping and kneeling. May be required to sit for long periods of time, listening, using a keyboard, video display terminal and telephone. Position requires a person who is able to handle stress and customers internal and external professionally and effectively. Must remain calm under pressure and have the ability to multi-task. Must be very flexible and be able to serve as a team leader for other members of the executive support staff. Must have the ability to adapt behavior and work methods in response to changing information, conditions or unexpected obstacles and problems. Some travel is required.

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 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. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee’s designated Headquarters 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.

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
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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
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