

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Supervisor II	OFFICE/BRANCH/SECTION District 4 / Executive	
WORKING TITLE Chief of Staff to District 4 Director	POSITION NUMBER 904-001-4801-XXXX	REVISION DATE

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

GENERAL STATEMENT:

Under the general direction of the Chief Deputy District Director, the Chief of Staff (Supervisor II) serves as the primary support to the District Director. This non-supervisory expert role is responsible for high-level communications, executive coordination, and oversight of complex projects and initiatives. The position requires sound independent judgment, discretion, and the ability to manage sensitive and time-critical matters. The incumbent is responsible to conduct thorough research, prepare executive-level reports and correspondences, and deliver briefings on statewide transportation policies and programs to ensure the District Director is well-informed and supported in decision-making.

CORE COMPETENCIES:

As a {Classification}, 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.

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
45% E	<p>The incumbent serves as a core member of the Executive Team and is responsible for directing, overseeing, and coordinating the daily activities of the District Director in close collaboration with the Chief Deputy District Director, Deputy District Directors, and Headquarters leadership. This includes managing the District Director's schedule and engagements to ensure alignment with strategic priorities and seamless coordination across internal and external stakeholders.</p> <p>The incumbent is responsible to exercises a high level of discretion and professionalism in handling sensitive and confidential matters; responsible for monitoring, organizing, and tracking tasks originating from meetings and stakeholder engagements to ensure timely completion and successful outcomes. The incumbent also responds to communications on behalf of the District Director.</p> <p>The incumbent is responsible to oversees the development, review, and approval of official correspondence, briefing materials, talking points, and agendas to ensure clarity, accuracy, and consistency with District messaging. They lead the administration of the Director Office Tracking System (DOTS), ensuring timely routing, tracking, and quality control of all executive correspondence and action items. Coordination with internal divisions is essential to ensure that responses are comprehensive and aligned with Caltrans policies and priorities.</p> <p>The incumbent is responsible to provide oversight of special initiatives and high-priority projects by conducting in-depth research, synthesizing findings, and delivering actionable recommendations. Responsible to lead the resolution of urgent and complex matters by engaging relevant stakeholders and coordinating cross-functional input. The role of the Chief Executive Liaison requires building and maintaining strong relationships with elected officials, legislative staff, and agency partners to support collaborative problem-solving and effective policy implementation.</p>

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45%	E	<p>The incumbent is responsible to lead and facilitate weekly Executive Team meetings by preparing agendas, guiding strategic discussions, and tracking action items to ensure alignment with District priorities. Incumbent attends meetings with the District Director as needed, providing issue briefings and preparing tailored materials to support informed decision-making.</p> <p>Incumbent is responsible to coordinates executive and stakeholder engagements, managing all aspects of meeting planning and content delivery, including the development of agendas, presentation materials, and background documentation; serves as the District's point of contact for co-hosting Executive Board meetings in the Bay Area, overseeing all logistics to ensure seamless execution.</p> <p>Incumbent is responsible to partner with External Affairs to drafts speeches, statements, and event remarks for the District Director, tailored to a variety of public and internal audiences; manage internal and external communications, enhancing the visibility of District 4 programs and initiatives. Promotes Caltrans priorities and prepares written materials to support public engagement and understanding of District efforts.. Incumbent is responsible to provide editorial oversight of all written materials to ensure clarity, professionalism, and alignment with District messaging. Develops and delivers high-impact presentation materials, including data visualizations and analytical content for executive audiences.</p>
10%	M	<p>Incumbent is responsible to provide comprehensive executive support to the District Director by coordinating complex travel arrangements, including detailed itinerary planning and logistical support for both in-state and out-of-state travel. Ensures smooth transitions between engagements and manages all related travel documentation. Prepares and processes Travel Expense Claims (TECs) in accordance with applicable policies and procedures, including the submission of monthly TECs and out-of-state travel requests as needed.</p>

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 include direct supervisory responsibilities; however, the incumbent is expected to lead and coordinate efforts with staff at all levels to complete projects and assignments, working under the general direction of the Chief Deputy District Director.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Possesses comprehensive knowledge of Caltrans' mission, vision, strategic goals, and organizational structure, as well as the high-level policies and procedures guiding the work of District 4 and the Department. Demonstrates a strong understanding of federal and state laws and regulations that shape California's transportation policy, along with general practices in transportation planning, including rail, transit, local assistance, research, and public engagement. Well-versed in public and business administration principles, including budgeting, personnel management, program evaluation, and organizational planning. Experienced in employee supervision, development, and training, with a solid grasp of program management and the legislative process. Knowledgeable about state and local government functions, departmental goals, and the Affirmative Action Program, including the managerial role in supporting diversity and equity objectives.

Skilled in analyzing complex policies, plans, and issues; conducting research; and developing practical, data-driven solutions. Adept at facilitating dialogue, gathering stakeholder input, and negotiating agreements with internal and external partners. Capable of compiling, interpreting, and presenting data effectively, both visually and in written formats. Works collaboratively as part of interdisciplinary teams, builds strong partnerships, and maintains productivity under tight deadlines. Applies logical and creative reasoning to assess transportation impacts and address multifaceted administrative challenges. Communicates clearly and persuasively, both orally and in writing, and provides sound advice to leadership and stakeholders. Experienced in managing staff services programs, setting priorities, allocating resources, and supporting affirmative action goals.

Maintains a professional demeanor and positive attitude in all interactions, delivering high-quality customer service. Handles sensitive and confidential matters with discretion, conducts investigations, and prepares clear, concise reports supported by meaningful statistical data. Demonstrates strong analytical skills, sound judgment, and the ability to manage multiple priorities effectively. Technologically proficient in tools such as Microsoft Word, Excel, and Access, and capable of delivering impactful presentations to diverse audiences. Builds and sustains collaborative relationships with internal teams, the public, and community organizations, while consistently applying modern administrative practices to support the Department's mission and goals.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is expected to exercise independent judgment and initiative in performing assigned responsibilities. This includes initiating, developing, and recommending changes to improve processes and outcomes. Failure to effectively carry out these duties may result in significant delays to project delivery, increased costs due to litigation, disruption to District 4 and Department

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operations, and a loss of public trust in Caltrans as a reliable public agency.

Operating with minimal supervision, the incumbent is responsible for maintaining and promoting a positive image of the Department. They provide timely, professional responses to management and internal/external stakeholders, and must remain adaptable to change, resolving issues with minimal disruption. As a liaison to management, the incumbent is expected to build and maintain strong working relationships with other managers to uphold the District's credibility. Poor judgment or inaccurate recommendations may compromise the disciplinary process, reduce management's confidence, and expose the Department to legal and financial risks.

PUBLIC AND INTERNAL CONTACTS

The incumbent is authorized to represent the District Director and serves as a key liaison across a wide range of internal and external stakeholders. In this capacity, the incumbent attends meetings with Deputy District Directors, program managers, staff, external partners, and representatives from state, regional, and local agencies, as well as members of the public. They regularly interact with individuals at all organizational levels, including Caltrans leadership, employees, and representatives from other public entities.

The role requires strong communication skills, both verbal and written, including professional and courteous interactions via phone and email. Incumbent is expected to handle complex and sensitive inquiries with discretion, competence, and integrity, and to communicate effectively with Headquarters functional managers, regional and district leadership, and individual employees.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent must be able to sit or stand for extended periods while working at a computer, using a telephone, or traveling long distances, including overnight travel. The role requires the ability to manage a high volume of varied tasks and documents, often under tight deadlines and shifting priorities. The workload is frequently subject to unexpected changes, requiring flexibility, critical thinking, and sound judgment to determine and implement effective courses of action under pressure.

Strong organizational and multitasking skills are essential, as is the ability to adapt quickly to evolving priorities and complete assignments on short notice. The incumbent must be capable of resolving emotionally sensitive issues with professionalism and diplomacy, recognizing and responding appropriately to challenging or emotionally charged situations. They are expected to foster a diverse, inclusive, and innovative work environment, and to develop and maintain cooperative working relationships across all levels of the organization. The position may also require public speaking and representing the Department at meetings or events. A self-starter mindset and the ability to work independently while maintaining professionalism in all interactions are critical to success in this role.

WORK ENVIRONMENT

The incumbent will primarily work in a climate-controlled office environment under artificial lighting; however, occasional fluctuations in temperature may occur due to heating or air conditioning issues. The position requires travel to field offices and work sites throughout the district to attend meetings or conduct investigations, which may include early morning, evening, or overnight assignments. Occasional in-state travel and overnight stays are required. Telework may be permitted when operationally feasible.

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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.)

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