

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION District 4/Compliance Management/Administration	
WORKING TITLE Executive Support Liaison	POSITION NUMBER 904-082-5393-xxx	REVISION DATE 04/16/2026

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 Equal Employment Opportunity (EEO), Executive and Support Services Branch Chief (Supervisor I), the Executive Support Liaison (Analyst II) provides comprehensive administrative support to the Executive Staff. The incumbent must be able to maintain a high level of confidentiality and demonstrate a high degree of responsibility involving complex administrative duties; and ability to study and review the activities of departmental programs to determine conformance with administrative policy. This position requires knowledge of the Department's operations and organizational structure, and must learn and understand concepts of organizational awareness, and have knowledge of the functional units within each Division. This position requires consistent practice and demonstrated ability of the principles of completed staff work.

CORE COMPETENCIES:

As an Analyst II, 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 - Collaboration, Integrity, Stewardship)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Integrity)
- **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 - 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. (Employee Excellence - Integrity)
- **Relationship Building**: The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Employee Excellence - Integrity, People First)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Integrity, People First)
- **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 - Integrity, People First)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - 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)

TYPICAL DUTIES:

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

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35%	E	<p>Incumbent is responsible for Executive Administrative Support and Correspondence Management, including provide primary high level administrative support to the Deputy District Directors (DDD's), ensuring smooth and efficient operation of the Executive Office. The incumbent must be able to multitask, adjust to shifting priorities, and complete assignments or projects within short time frames and with minimal guidance; independently prepare correspondence and reports, and prepare, monitor, and complete special assignments as directed.</p> <p>Incumbent is responsible to assign assign, route, track, and log documents requiring executive signature; prepare, edit, and finalize correspondence; independently draft letters, reports, and written materials; research, gather, and prepare background materials needed for meetings or engagements; screen and direct inquiries to appropriate staff; conduct research and prepare administrative reports for DDD review; prepare administrative reports and conduct research to support executive decision making; serve as the subject matter expert on departmental correspondence guidelines; provide technical direction on formatting organization, and packaging of written communications; prepare and maintain procedure manuals for the DDD Office and Departmental administrative policies; review proposed administrative changes and advise DDD's on potential impacts to Departmental programs.</p>
25%	E	<p>Incumbent is responsible for coordination of Meetings, Calendars, and Safety/Training, including manage executive calendars, coordinate meetings, prepare meeting materials, and provide support for required trainings and Safety activities and requirements.</p> <p>Incumbent is responsible to maintain and update DDD's calendars; confirm meetings, including date, time, location, subject, and attendees; coordinate and schedule meetings; reserve and maintain conference rooms; coordinate and confirm professional meeting set ups; prepare meeting folders, including all necessary materials, maps, and confirmations; draft meeting agendas and prepare/distribute meeting materials; track and schedule mandatory training and Safety meetings; attend regular management staff meetings; take notes, prepare minutes, and distribute/post within required timelines as scheduled; independently confirm status and follow up on pending meeting and action items; gather information for future meetings; prepare draft agendas for DDD review.</p>
20%	E	<p>Incumbent is responsible for Travel Coordination and Expense Claim Processing, including coordinate DDD travel logistics, arrange itineraries and ensure proper processing of executive travel and related reimbursement claims.</p> <p>Incumbent is responsible to schedule and coordinate travel arrangements, including transportation, accommodations, itineraries, and site reservations; submit out of state travel trip requests and follow up with Business Management for timely approval; prepare, gather, and organize all materials required for trips or off site meetings; complete, submit, track, and monitor Travel Expense Claims (TEC's) to ensure accuracy and timely processing.</p>
10%	E	<p>Incumbent is responsible for Project Tracking, Reporting, and Strategic Plan Support, including provide support to Executive leadership by use of tracking tools, monitoring progress, and reporting on key initiatives and strategic goals.</p> <p>Responsible for development of reporting tools to monitor deadlines, project status, and required responses; provide daily, weekly, and monthly status updates to DDD's and other stakeholders; track and monitor District Strategic Plan and Strategic Action Plan goals; monitor performance indicators; provide monthly updates to ensure organizational goals are met; support the development of the District's Strategic Plan and project current and future organizational requirements; and conduct special projects as assigned.</p>
5%	E	<p>Incumbent is responsible for Hiring and Interview Logistics Support, including provide administrative support for hiring activities and interview coordination for Executive-level recruitment.</p> <p>Responsible to provide logistical support, including scheduling candidates, preparing interview rooms, and coordinating virtual and/or in-person interview materials; schedule interviews and reserve conference rooms; provide on site or virtual support for interview panels; organize and prepare all necessary materials for interviews.</p>

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5% M Incumbent is responsible for other duties as required, including perform additional administrative and operational duties within the Division of Administration.

Responsible to disseminate information and reports to Divisions on behalf of the DDD's; maintain conference room calendars and reservations, and ensure rooms are professionally prepared; complete required training and perform additional related duties as assigned within the Division of Administration; perform other related duties consistent with the classification of Analyst II.

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 have supervisory responsibilities. May act as lead for Executive Assistant or Analyst I.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of the Department's organization, strategic plan, policies, procedures, administrative survey techniques, skills, and application, statistical research and methods. Must have the ability to think clearly, quickly, and analyze and solve problems; work independently; establish and maintain cooperative working relationships; complete assignments without detailed instruction; communicate effectively and efficiently in writing and verbally. Must be able to compose clear and concise correspondence, reports, and technical documents including correct formatting, drafting, and proofreading; must interact with others in a professional and tactful manner; must behave in a fair and ethical manner, and demonstrate commitment, responsibility and integrity; Must have the ability to multitask; must demonstrate good judgment in organizing and prioritizing workload to ensure deadlines are met timely; must be able to identify requests for information and direct them to the appropriate parties for response and/or resolution; Must demonstrate capacity for assuming increased responsibility. Must be able to maintain a high level of confidentiality.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Actions at this level have impact on the image and integrity of the District and the Department. The incumbent must have good judgment, tact, and the ability to communicate effectively, as errors may have significant impact on the internal and external operations of the District and Department.

PUBLIC AND INTERNAL CONTACTS

The incumbent maintains communication with all levels of staff and management; including Executive management, other Districts and programs within the Department, private agencies, and the public; May also interact with federal and state legislators, Governor's Office staff, and high-level transportation stakeholders.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: Employee may be required to bend, stoop, and kneel. Must be able to sit and/or stand for long durations and perform tasks utilizing a PC.

Mental: Must have mental acuity for problem solving, analysis, and reasoning; must have the ability to multitask, adapt to changes in priorities, and complete tasks or projects on short notice; must demonstrate the ability to develop and maintain cooperative working relationships with individuals of diverse cultural backgrounds.

Emotional: Must be able to work in sensitive, emotionally charged and confidential situations; must maintain tact, composure and diplomacy at all times; must be able to display ethical behavior at all times with all parties involved while conducting State business. It is critical that the employee demonstrate the ability to work with others in a cooperative and respectable manner.

WORK ENVIRONMENT

While at their base of operation, the employee will be required to work in a climate-controlled office, under artificial light and potentially fluctuating building temperatures. The incumbent may be required to travel in State.

The designated work hours for this position are 7:30am – 4:15pm. The incumbent is required to come into the District office Monday through Thursday, and may be eligible for telework on Fridays. 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 may be required to conduct business travel on behalf of the department or be required to commute to the headquartered location as needed to meet operational needs. Business travel reimbursement 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 employee. District 4 is currently allowing hybrid telework, where the incumbent may work from home but is required to come into the District Office on designated days. While the employee is teleworking at home, they must be reachable

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by phone and email during normal work hours.

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