

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst IV	OFFICE/BRANCH/SECTION District 11/Executive	
WORKING TITLE Chief of Staff	POSITION NUMBER 911-001-5403-xxx	REVISION DATE 04/21/2026

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 District Director, the Analyst IV acts as the Chief of Staff and serves as the primary support for the District Director. The Chief of Staff is responsible for strategic and business planning, performance measures, and program development and coordination. Develops, reviews, analyzes and recommends a variety of programs for the Executive Team. Oversees complex projects and initiatives. Conducts thorough research, prepares executive-level reports and correspondences, and delivers briefings on statewide transportation policies and programs to ensure the District Director is well-informed and supported in decision-making. Demonstrates clear and concise verbal and written communication and oversees coordination of the District Director's office with a wide latitude for independent action. Handles highly sensitive issues, which requires the incumbent to exercise a high degree of initiative and must maintain a high level of confidentiality and act as a confidante and/or advisor to the District Director.

**CORE COMPETENCIES:**

As an Analyst IV, 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. (Prosperity - Collaboration, People First, 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 - Collaboration, Integrity, People First, Stewardship)
- **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. (Safety, Equity, Prosperity, Employee Excellence - Equity, People First, Pride, Stewardship)
- **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. (Safety, Prosperity - Innovation, Pride, Stewardship)
- **Interpersonal Savvy/Partnering**: Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Prosperity, Employee Excellence - Collaboration, Innovation, People First)
- **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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **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. (Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Forward Thinking**: Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Safety, Equity, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Business Acumen**: Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Prosperity - Innovation, People First, Stewardship)

**TYPICAL DUTIES:**

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

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30%	E	Conducts expert analysis and recommends improvements for District-wide strategic planning processes. This includes researching and preparing monthly, quarterly and annual updates and any requested changes and additions for the District Business Plan. Oversees business processes and process reviews to continually improve the District functions and to integrate new recommendations from core functions into business processes; evaluates progress towards established performance goals and, with the management team, recommends effective strategies to address deficiencies. Analyzes data, prepares effective presentations and displays of information. Evaluates and monitors activities in partnership with expert functional managers. Creates original content consistent with the District's goals and objectives, builds and develops relationships with all employees for increased efficiency, and implements effective responsiveness into existing operations. Assists in defining new operational strategies, working with the District Director and executives on special projects to completion.
25%	E	Provides identification, formulation, and ongoing revisions to Strategic Business Plan goals, District Strategic Action Plan goals and program matrix including new objectives, appropriate strategies for implementation and valid performance measurement development. Responsible for developing and maintaining a variety of quarterly reports and automated dashboards documenting performance. Develops management information collection tools, identifies best practices for compiling, tracking and validating performance measures and results using management indicators, workload standards and tools related to the District. Leads development and implementation of management indicators and workload standards consistent with the Departmental and Program Strategic Plans. Develops tracking systems for established statewide management indicators and monitors progress toward achieving its goals and objectives.
20%	E	Leads in the development of major District policy and initiatives. Communicates policy decisions and other sensitive information to the Executive Team, and coordinates and performs studies of special interest to the District Director and Chief Deputy District Directors. Identifies issues/needs, conducts independent research and formulates recommendations on the pro/cons of recommended actions. This requires in-depth knowledge of the District Director's vision, plans and goals. Provides direction in the development of the strategic planning and goals of the District; develops the short and long term policies in alignment with Caltrans Strategic Plan and state transportation priorities; establishes Division Program Level Action Plans that include the Department's goals, strategic objectives, strategies and performance measures. Works with Headquarters and District Divisions to oversee complex, high-priority projects assigned by the District Director or Chief Deputy District Directors with responsibility for outcomes. Develops and reviews strategies to ensure District 11 programs and initiatives align with the strategic plan and desired outcomes. Conducts special administrative and research studies on a wide range of subjects related to the overall management and operations of District 11, as well as special projects and programs initiated by the District Director and Chief Deputy District Directors. Provides on-going analysis and delivery of projects to maximize use of resources; monitors project costs and performance, service levels and other metrics required to ensure project goals and objectives are met. Participates in policy development by the management team to implement related efforts.
20%	E	Attends meetings with the District Director as needed, providing issue briefings and preparing tailored materials to support informed decision-making. Coordinates executive 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 District, overseeing logistics to ensure seamless execution. Partners with External Affairs to draft speeches, statements, and event remarks for the District Director, tailored to a variety of public and internal audiences. Promotes Caltrans priorities and prepares written materials to support understanding of District efforts. Develops and delivers high-impact presentation materials, including data visualizations and analytical content for executive audiences.
5%	M	Leads and facilitates weekly Executive Team meetings by preparing agendas, guiding strategic discussions, and tracking action items to ensure alignment with District priorities. 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.

<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**

This position does not include direct supervisory responsibilities; however, the incumbent is expected to lead and coordinate

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efforts with staff at all levels to complete projects and assignments, working under the general direction of the District Director.

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

- Caltrans mission, vision, strategic goals, and organizational structure
- High-level policies and procedures relevant to Caltrans District 11 and the Department
- Critical Federal and State laws and regulations governing transportation policy in California
- General practices of transportation planning, including rail, transit, local assistance, research, and public participation
- Principles and practices of public and business administration, including budget, personnel, management analysis, planning, and program evaluation
- Formal and informal aspects of the legislative process
- Departmental goals and policies, governmental functions at State and local levels, and Equal Employment Opportunity Program objectives

Ability to:

- Analyze policies, plans, and problems; research and develop solutions; recommend appropriate courses of action
- Facilitate input and assist with negotiations among stakeholders
- Gather, compile, and interpret data; develop materials for effective presentation
- Work productively and collaboratively as part of interdisciplinary teams; build strong partnerships
- Monitor and organize multiple ongoing activities; ensure deadlines are met
- Assess impacts of policies and projects on transportation systems, considering social, political, economic, and environmental factors
- Apply logical and creative reasoning to resolve complex governmental and managerial problems; develop and evaluate alternatives
- Consult with and advise administrators and stakeholders; maintain confidence and cooperation throughout the course of work
- Review and edit written reports; utilize teams effectively in studies
- Establish and maintain project priorities; effectively utilize resources; contribute to Equal Employment Opportunity Program objectives

Analytical Requirements:

- Analyzing complex policies, plans, and issues, conducting research, and developing practical, data-driven solutions
- Facilitating dialogue, gathering stakeholder input, and negotiating agreements with internal and external partners
- Compiling, interpreting, and presenting data effectively, visually and in written formats
- Communicating clearly and persuasively, both orally and in writing
- Setting priorities, allocating resources, and supporting the Equal Employment Opportunity Program

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### 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 11 and Department 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.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent serves as a key liaison across a wide range of internal and external stakeholders. In this capacity, the incumbent attends meetings with the District Director and other executives, 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.

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**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.

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