

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Supervisor II	OFFICE/BRANCH/SECTION Administration	
WORKING TITLE Office Chief, Executive & Administrative Services	POSITION NUMBER 904-001-4801-xxx	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 of the Deputy District Director of Administration, including the executive staff, the Office Chief of Executive and Administrative Services serves as a senior managerial authority providing strategic leadership, supervision, and operational oversight for all Executive and Administrative Services functions.

The incumbent Office Chief leads Executive Support, administrative coordination, sustainability program development, audit and compliance activities, quality assurance, risk management, and district-wide strategic initiatives, including coordination of the District Strategic Action Plan. The incumbent ensures seamless and consistent executive operations, high-quality administrative practices, and alignment with the organization’s mission, vision, values, and district-wide priorities.

The incumbent manages subordinate supervisors and staff, fosters a collaborative and high-performing work environment, and ensures cohesion across executive and administrative functions. This role requires a high level of confidentiality, independent judgment, strategic thinking, professional discretion, and the ability to supervise, mentor, and coordinate staff performing complex executive and administrative duties.

CORE COMPETENCIES:

As a Supervisor 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.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Integrity, People First, Pride, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Prosperity - Collaboration, Integrity, People First, Stewardship)
- **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. (Equity, Employee Excellence - Equity, Integrity, People First, Pride, Stewardship)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Equity, Prosperity - Collaboration, Equity, Integrity, People First, Pride, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Prosperity, Employee Excellence - Collaboration, Innovation, People First, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity, Employee Excellence - Integrity, People First, Pride, Stewardship)
- **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. (Equity, Climate Action, Employee Excellence - Collaboration, Integrity, People First, Pride, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

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

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35%	E	Executive Leadership, Direction & Administrative Oversight: Incumbent provides vision, leadership, and direction to subordinate supervisors and staff to ensure high-quality, effective execution of executive and administrative support operations; Leads the development and implementation of district-wide administrative initiatives, strategic priorities, and high-visibility functions that support Executive Leadership and the District Strategic Action Plan; Fosters a culture of professionalism, accountability, teamwork, communication, continuous improvement, and organizational alignment across all administrative and executive support functions; Exercise full supervisory authority over subordinate positions, including hiring, training, performance evaluations, coaching, mentoring, workload oversight, and development of staff capability. Incumbent is responsible to standardize and streamline administrative processes, including scheduling, correspondence flow, records management, workflow systems, and project tracking, ensuring consistency and coordinated support for district executives and program areas; Manage executive processes and track district-wide priorities, facilitating cross-organizational communication and ensuring seamless coordination with Headquarters, regional partners, and external agencies; Oversee executive communications, including correspondence review, messaging accuracy, briefing materials, talking points, and stakeholder engagement, to ensure clarity, consistency, and timely responses. Incumbent is responsible to represent the Executive Office in internal and external meetings and engagements, providing high-level support and ensuring continuity of operations across executive functions; Ensure alignment of work across all administrative and executive support units to maintain cohesive service delivery and consistent implementation of departmental processes.
30%	E	Executive Support, Strategic Coordination & Operational Management: Incumbent is responsible to provide support to district Chief of Staff, assist in oversee executive communications, correspondence, briefing materials, talking points, and stakeholder engagement to ensure clarity, accuracy, timeliness, and consistent messaging; Provide oversight of providing support and manage of executive workflows and coordination across leadership, programs, the Executive Team, and Headquarters, ensuring timely follow through on priorities and seamless operational alignment; provide back-up and support of leading planning and facilitation of executive meetings, including agenda development, briefing preparation, issue analysis, decision point identification, and action item tracking; Organize and oversee logistics for internal and external meetings, executive events, and interagency collaborations to ensure comprehensive operational support. Incumbent is responsible to conduct research, policy analysis, and issue evaluation; prepare high quality briefing materials and strategic recommendations to inform district and statewide decision making; Track, monitor, and report progress on district strategic initiatives and priority projects, including deliverables aligned with the District Strategic Action Plan, identify emerging issues, and recommend solutions. Incumbent is responsible to provide daily, weekly, monthly and quarterly briefings, instructions, guidance updates and reports.

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30%	E	Customer, Stakeholder & Discipline Services Support; Sustainability, Risk Management & Audit Oversight: The incumbent is responsible for prioritizing and responding to the needs of internal and external customers with professionalism, clarity, and responsiveness, ensuring timely and accurate support across administrative, executive, sustainability, audit, risk management, and oversight of discipline related functions. The role fosters positive working relationships and maintains open, effective communication with district leadership, Headquarters, governmental agencies, community organizations, and the public to strengthen trust, collaboration, and shared outcomes. The incumbent provides comprehensive Discipline Services support oversight by reviewing progressive discipline processes; reviewing corrective memorandum, Rejections During Probation, AWOL determinations, and Notices of Adverse Action; ensuring due process compliance; and providing oversight guiding supervisors and managers on documentation requirements and appropriate corrective actions. The role provides oversight and collaboration with district Discipline Services leadership to track discipline cases, support investigations, assemble ODS 001 discipline packages, and maintain accountability across district programs through coordination with Labor Relations, Workers' Compensation, Reasonable Accommodation, Audits and Investigations, Workplace Violence Prevention, and other internal units. The incumbent also supports district-wide training efforts by advising supervisors and managers on proper documentation, informal corrective actions, the progressive discipline system, and departmental compliance requirements. The incumbent is responsible to lead development and implementation of district level administration sustainability policies, directives, action plans, and strategies aligned with statewide goals, ensuring sustainability principles are integrated into administrative and operational practices. The role manages the Administration Division's District Sustainability Plan in collaboration with the District Sustainability Coordinator/Manager; attends sustainability meetings; and prepares monthly reports tracking metrics, progress, implementation activities, and emerging concepts. The incumbent provides guidance and consultation to staff and executive leadership to strengthen culture change and embed sustainability as a core organizational priority. The incumbent provides support to district Legal office and oversees district audit review and response processes, including preparation of complete audit work paper packages, response reports, management letters, and related documentation consistent with audit standards. The role evaluates audit findings, coordinates with affected programs, assesses internal controls, conducts analyses, and develops actionable recommendations to improve compliance and operational integrity. The incumbent manages districtwide quality assurance and risk management functions, designing and leading complex, cross functional initiatives that support district and statewide operational needs, while maintaining strict adherence to confidentiality, departmental policies, and applicable federal and state laws. The role ensures accurate, timely compliance with legislative mandates related to data reporting and other requirements under the Section's responsibility.
5%	M	Incumbent is responsible to perform special projects, research assignments, and cross-functional tasks as directed by executive leadership, including supporting district initiatives, preparing ad-hoc briefings, and assisting with emergent operational needs; Provide occasional back-up coverage for other managers, supervisors and Administrative Services functions, ensuring continuity of operations during staff absences or high-priority workload surges; Assist with the coordination of district events, recognition activities, community engagement efforts, and internal communications to strengthen organizational culture and support department-wide priorities; Participate in work groups, committees, and interdepartmental collaborations to advance statewide initiatives, improve administrative processes, or address emerging issues requiring executive attention; Support executive leadership by performing miscellaneous administrative duties, including document reviews, logistical coordination, and data inquiries, as needed to maintain smooth, timely, and effective district operations.

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

The incumbent exercises full supervisory authority over analysts, administrative staff, and other personnel supporting Executive and Administrative Services. Responsibilities include hiring, training, performance evaluations, coaching, mentoring, workload

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oversight, and daily direction.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge:

- Comprehensive knowledge of Caltrans' mission, vision, strategic goals, statewide priorities, organizational structure, and departmental policies and procedures.
- Strong understanding of federal and state laws, regulations, and administrative requirements public administration, and departmental operations.
- Knowledge of sustainability principles, risk management frameworks, executive operations, and administrative practices.
- Principles and practices of public and business administration, including budgeting, personnel management, labor relations, program evaluation, organizational development, and supervision.
- Knowledge of equal employment opportunity objectives, safety, reasonable accommodation, workers' compensation requirements, and departmental compliance programs.
- Familiarity with investigative methods, trial and administrative hearing procedures, rules of evidence, and disciplinary processes.
- Proficiency with modern technology, office systems, and analytical tools (e.g., Word, Excel, Access) used for data analysis, documentation, and reporting.

Abilities:

- Analyze complex policies, regulations, data, and organizational issues; develop technically sound solutions; and recommend effective courses of action.
- Interpret rules, policies, and procedures and apply them accurately to varied operational, administrative, and personnel matters.
- Facilitate dialogue, negotiate agreements, and work collaboratively with internal leaders, program staff, governmental agencies, community organizations, and other stakeholders.
- Gather, compile, analyze, and present data clearly, both orally and in writing, including the ability to produce concise reports, briefing materials, and presentations.
- Supervise, mentor, and develop staff; assign and manage workload; evaluate performance; and lead multidisciplinary teams.
- Work effectively under pressure, manage multiple priorities, remain adaptable, and meet strict deadlines in high visibility executive environments.
- Maintain confidentiality, professionalism, discretion, and diplomacy when dealing with sensitive or complex personnel, administrative, or policy issues.
- Build and maintain strong working relationships with staff, management, external partners, and the public; foster a collaborative and inclusive work environment.
- Identify problems, evaluate alternatives, and implement corrective measures, including recognizing risk, developing mitigation strategies, and maintaining compliance with departmental objectives.
- Communicate clearly and logically, both in writing and verbally, including the ability to present information to large or diverse groups.

Analytical Requirements:

- Reason logically and creatively using a variety of analytical techniques to evaluate complex governmental, managerial, and operational problems.
- Conduct investigations, review evidence, assess circumstances, and prepare clear summaries, findings, and recommendations.
- Assess impacts of policies, projects, or decisions on transportation systems, considering social, political, economic, environmental, and regulatory factors.
- Develop and evaluate alternatives, interpret data, anticipate implications, and formulate sound recommendations aligned with program and departmental priorities.
- Analyze personnel and management issues impartially; recommend appropriate solutions; and support corrective or disciplinary actions consistent with legal and policy requirements.
- Prioritize large volumes of work, manage competing deadlines, and maintain accuracy and judgment in fast paced environments.
- Apply critical thinking and decision making skills to resolve sensitive, politically charged, or complex administrative issues.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent exercises a high degree of independent judgment in managing executive operations, supervising staff, and making decisions with district-wide impact. Errors in analysis, communication, policy interpretation, or operational decision-making may lead to delays in project delivery, audit deficiencies, reputation harm, diminished confidence in executive leadership, and negative impacts on critical district initiatives.

Failure to properly execute responsibilities or respond to emerging issues may result in substantial financial cost, litigation exposure, disruption of internal and external operations, or loss of public trust in Caltrans as a responsible public agency. The incumbent must remain adaptable to sudden changes, applying initiative to implement solutions with minimal organizational disruption while maintaining strong working relationships to preserve the district's credibility.

The incumbent is also responsible for safeguarding confidential employee data in compliance with the Information Practices Act

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(Civil Code §1798 et seq.). Failure to protect sensitive information, including personnel records, medical data, or other legally protected information, may lead to grievances, lawsuits, reputation damage, or disciplinary action up to and including termination. Overall, the position carries substantial accountability for ensuring accurate decision-making, maintaining compliance with departmental policies and statutory requirements, upholding public and organizational confidence, and preventing adverse operational, legal, and financial consequences.

PUBLIC AND INTERNAL CONTACTS

The incumbent regularly interacts with district executives, managers, supervisors, and staff across all programs, as well as Caltrans Headquarters personnel. Engagement extends to a broad range of external entities.

As an authorized representative of the Deputy District Director of Administration, the incumbent attends meetings, provides information, and coordinates with internal and external stakeholders to ensure consistent communication and responsive service. Professionalism, tact, diplomacy, and discretion are essential in all interactions. The incumbent must communicate effectively through email, telephone, written correspondence, and in-person or virtual meetings, often addressing sensitive or complex inquiries.

The role requires independently conferring with all levels of Caltrans management, employee representatives, Legal Division attorneys, Audits and Investigations staff, the Discrimination Complaint Investigation Unit, and the State Personnel Board. The incumbent routinely handles high-level or sensitive queries with competence and integrity, ensuring clear communication with Headquarters functional managers, regional counterparts, and individual district employees.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees must be able to sit or stand for extended periods while using a computer, keyboard, telephone, or video display equipment, and may occasionally need to bend, kneel, or lift lightweight materials. Travel, sometimes long-distance or overnight, may be required depending on operational needs. Workload demands may shift quickly, requiring the ability to organize and prioritize large volumes of varied assignments and adapt to frequent, substantial, and unexpected changes.

The position requires strong critical-thinking skills, including the ability to analyze information, determine effective courses of action under pressure, adjust work methods as circumstances evolve, and complete tasks on short notice. Employees must be able to manage multiple assignments simultaneously, maintain focus, and remain flexible and open to change.

Emotional resilience is essential. The incumbent must maintain professionalism, diplomacy, and sound judgment in challenging or emotionally charged situations; foster cooperative working relationships; respond appropriately to difficult interactions; and demonstrate the ability to navigate sensitive issues with tact and integrity. The role requires supporting a diverse and inclusive work environment and, at times, speaking or presenting before groups or representing the department in public or internal meetings.

The position may involve office, remote, and occasional field environments. Remote work requires a safe and ergonomic workspace, reliable technology, and effective communication. Field or travel assignments may involve exposure to noise, uneven surfaces, dirt, or weather extremes. Employees must be ready to report to the worksite on short notice when operational needs arise. A valid driver's license may be required when operating a state vehicle.

WORK ENVIRONMENT

The position is primarily office-based, requiring frequent communication across multiple organizational levels. Work is conducted in a climate-controlled office under artificial lighting, though building temperatures may fluctuate due to heating or air-conditioning issues. Telework may be approved when operationally feasible, but in-person attendance may be required depending on district needs. The incumbent may be required to travel within the state to attend field visits, off-site meetings, or work-site investigations. Some travel may occur before or after normal business hours, and occasional night work or overnight travel may be necessary. Overall, the role involves a mix of office duties, virtual collaboration, and periodic field responsibilities, requiring flexibility to shift between environments as operational requirements arise.

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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
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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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