

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION 85-Director's Office/Executive Management	
WORKING TITLE Executive Analyst	POSITION NUMBER 900-085-5393-XXX	REVISION DATE 08/17/2026

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 Chief of Staff, a Manager II, the Executive Analyst performs a variety of analytical duties in support of the Director's Office executive management team required for the efficient operation. The incumbent will regularly communicate with executive-level management, including support to the Director, Chief Deputy Director, and executive management staff. The incumbent must exercise a high degree of initiative, independence, and maintain confidentiality due to highly sensitive issues pertaining to the department's headquarters operations. A positive attitude and commitment to providing quality customer service that is accurate and timely to meet customers needs.

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. (Prosperity - Collaboration, Equity, People First)
- Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, People First, 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 - Innovation, People First, 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, People First, Stewardship)
- Teamwork and Collaboration**: Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Employee Excellence - Collaboration, Integrity, 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. (Prosperity - Collaboration, Innovation, 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 - Collaboration, People First)
- Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- Organizational Skills**: Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Innovation, People First, Pride, Stewardship)

TYPICAL DUTIES:

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

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40%	E	The Executive Analyst provides analytical support to the Director's Office. Key responsibilities include coordinating and managing the calendars for the Director and as necessary the Chief Deputy Director, ensuring precise scheduling of complex and sensitive meetings while exercising sound judgment regarding appropriate timing and participants. The Executive Analyst oversees the scheduling process for high-level engagements and maintains strict confidentiality throughout. Additionally, the Executive Analyst is tasked with preparing briefings and/or documentation for various executive meetings, ensuring that all necessary materials are available and systematically organized. The incumbent plays a pivotal role in managing the flow of information within the office, ensuring that all communications are handled with utmost efficiency and effectiveness. The incumbent will submit the Week Ahead Report, detailing executive activities to Legislative Affairs on a weekly basis. The Executive Analyst also maintains and updates office records, guaranteeing that all documents are filed correctly and made readily accessible when required.
25%	E	The Executive Analyst ensures the executive has complete, accurate, and timely information necessary for meetings and scheduled engagements. Coordinates the preparation, collection, organization, and availability of briefing material, agendas, dossiers or background information, talking points, and other documents required by the executives for meetings, events, travel, and engagements. Reviews documents and provides follow up with appropriate staff, including executive team members, to ensure materials are accurate, complete, and provided within established timelines.
15%	E	The Executive Analyst coordinates and manages executive travel for the Director and as necessary the Chief Deputy Director, including processing travel requests, making necessary travel reservations via concur, developing detailed travel itineraries, and coordinating transportation, lodging, meetings, and other logistical requirements.
10%	E	The Executive Analyst screening phone calls for the Director and as necessary the Chief Deputy Director and may assist the Chief of Staff in the development of all written correspondence, providing guidance and direction to executive office staff. The incumbent may also assist the Chief of Staff with analyzing documents to ensure consistency with administrative policy and prioritize material for the District Director's personal reply.
5%	E	The Executive Analyst will handle parking requests for executive staff, and manage badge renewals for Director's Office executive staff and Caltrans partners (CTC, CalSTA, FHWA).
5%	M	Other duties as assigned.

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 exercise supervision over others.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The incumbent must demonstrate a high degree of responsibility involving complex high level of confidentiality and responsibility in addition to specialized knowledge of the Departments operations and organizational structure; an awareness of current issues; contact with high-level State/Federal and Local Agencies, the Legislatures, the California State Transportation Agency, the Governor's Office and numerous external organizations. The incumbent is responsible for studying and reviewing the activities of the departmental programs to assist in determining conformance with administrative policy - the level of work required for this position is considered advanced and the incumbent must be able to work under minimal direction using good judgment and discretion. The incumbent must be able to read and understand a variety of documents. Must deal effectively with pressure while maintaining focus and remaining professional even under adversity. Must be a broad thinker who can navigate details. Must possess the ability to prepare clear and concise reports, analyze and solve difficult problems, develop technically sound alternatives and solutions to all office problems; develop new policies, procedures, organization changes or revisions; convey ideas and thoughts clearly and logically, communicate effectively, both written and orally with all levels of staff, deal tactfully with all parties in stressful situations, make timely decisions, prioritize critical programs, and excel in conflict resolution. . Must be able to reason logically and creatively and utilize a variety of analytical techniques in developing realistic conclusions and effective solutions to complex problems. be able to negotiate settlement of complex issues to the satisfaction of all parties. Must have comprehensive knowledge of the Department's entire development and control process, including principles of administration, organizational and management practices; analyze and understand the implications of law, policy, rules, and legislation pertaining to Caltrans activities. Must possess the ability to express and present ideas and information effectively, develop and maintain good working relationships with management, staff, the public, and community organizations.

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must be sensitive and exercise good judgment in dealing with the public, outside agencies and Caltrans' staff. Not providing adequate support and maintaining a high level of interpersonal communication skills could impact sensitive projects, affect critical deadlines, and reflect poorly on the integrity of the organization.

PUBLIC AND INTERNAL CONTACTS

Maintains communication with all levels, including executive management, Districts and programs within the Department, public and private agencies. Maintains communication with special transportation interests external to the Department, including federal and state legislators, staff of the Governor's Office, California State Transportation Agency and high-level transportation stakeholder organizations.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time while using a keyboard and video display terminal or traveling in a vehicle to other locations; will be involved with sustained mental activity needed for analysis, reasoning and problem solving. The workload is subject to frequent, substantial, and unexpected changes within a short time period. The incumbent must have the ability to resolve emotionally charged issues reasonably and diplomatically. The incumbent must have the ability to develop and maintain cooperative working relationships, respond appropriately to difficult situations; recognize emotionally charged issues or problems and acknowledge the various responses. Must have the ability to apply sound judgment in problem solving. Must be able to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. May also be required to speak in front of large groups or assist with representing the department at various meetings.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial light. Due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. May be required to travel locally and statewide. This position may be eligible for telework. 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 will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered 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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