

Duty Statement Excluded

☐ **Proposed**
(Submit to HR for
Review)
☒ **Final**

Print or type.
See Specific Instructions on page 2.

A. Current Position Number	B. Probationary Period	
785-300-4800-xxx	12 months	
C. Incumbent Name	D. Classification/Job Title	E. Effective Date
	Staff Services Manager I / Records Management Manager	
F. Unit, Section, Division	G. Location	
Records Management and Appraisal Unit, Archives Division	☒ Sacramento ☐ Los Angeles	
H. Name of Immediate Supervisor/Manager	I. Classification/Title of Immediate Supervisor/Manager	
	Staff Services Manager III / Assistant Division Chief	
J. CBID	K. Time Base	L. Tenure
M01	☒ Full Time ☐ Part Time ☐ Other	☒ Permanent ☐ Permanent Intermittent ☐ Limited Term ☐ Intermittent ☐ Other
M. Work Schedule	N. Work Hours	
Monday - Friday	8:00 a.m. – 5:00 p.m.	
O. Background Check Required	P. Job Requires Driving Automobile	Q. Certification Required
☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes Click here to enter text. ☒ No

Section II JOB DESCRIPTION

Indicate the major functions and associated duties, and the percentage of time spent on each (list higher percentages first). Essential functions assigned less than 5% should be combined with other task statements. The total percentage of all functions, including marginal, must equal 100%.

DESCRIBE THE ORIGINAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Assistant Division Chief of the Archives Division, the incumbent provides direct supervision over the Records Management and Appraisal (RMA) Section, which includes the California Records and Information Management (CalRIM) and coordinating with the Collections Manager with the State Records Appraisal Program (SRAP) sub-units; supervises and evaluates program activities of a staff of analysts and professional archivists; Serves as the Records Management Coordinator (RMC) for the Secretary of State; assists in the formulation, change management, implementation, and administration of records management and appraisal programs and planning; assists the Division Chief and Assistant Division Chief in the formulation of policy and procedures; attends conferences, meetings and hearings; and works with members of the Archives Division Management Team to implement the mission of the Division.

ESSENTIAL FUNCTIONS

- 40% ☒ Supervision:
Supervise and direct the work of analysts with primary assignments to the RMA Section; evaluate the performance of staff; records retention schedules and approvals; training class review and approval; review monthly workload reports and statistics; assist in development of strategic plans for the division and archives programs; distribute assignments as necessary; formulate and implement Division policy and programs.
- 30% ☒ Administration:
Plan, organize, direct, implement, and evaluate all activities of the RMA Section, which provide critical public services that support the Division's mission and objectives. Carry out high-level program assignments as directed by the Assistant Division Chief; assist in creating a strategic plan, developing program guidelines and best practices, coordinating the work of staff; prepare reports and statistics; provide subject matter expertise regarding pending legislation and regulations; and perform high-level professional work in support of the Division's mission, as required.
- 20% ☒ SOS Records Management Coordinator:
Serve as the Records Management Coordinator (RMC) to administer a comprehensive records management program within the Secretary of State's Office; write internal records management policies and procedures; provide input to agency management and other staff on all processes related to records management; train selected staff members in each division in records management principles and practices; recommend space layouts, utilization of equipment, staffing and production standards; review and approve the acquisition of filing and other equipment related to records storage; oversee revisions to internal retention schedules and facilitate transfers, destruction requests, billings, and problem resolution with the State Records Center.

MARGINAL FUNCTIONS

- 5% ☒ Outreach:
Working closely with the Assistant Division Chief, assist in establishing and maintaining cooperative and consultative relationships with legislators, the Governor's office, the judicial branch, state and local agencies, boards and commissions, nonprofit support groups, universities, historical and archival groups, legal offices, and others contacted in the course of work; address groups on the work of the agency and matters of records management and state historical interest.
- 5% ☒ Professional Activities
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Reads professional literature and attends conferences, workshops, and lectures to keep abreast of current archival and records management practices; arrange and conduct tours for legislative, genealogy and other research groups; assist in the development of archival programs and procedures; prepare reports; attend staff meetings and training sessions

Section III

EMPLOYEE/SUPERVISOR STATEMENT

You are a valued member of the Secretary of State's office. You are expected to conduct yourself professionally and work cooperatively with team members and others during the course of your duties to enable the department to provide the highest level of service possible. You are to adhere to all applicable state and federal laws, rules and department policies; and exercise good judgment in assisting team members and the public. Your efforts to treat others fairly, honestly and with respect are critical to the organization's mission and values.

EMPLOYEE'S STATEMENT: I HAVE READ AND UNDERSTAND THE DUTIES, RESPONSIBILITIES, AND PERFORMANCE EXPECTATIONS OF THE POSITION AND DISCUSSED WITH MY SUPERVISOR. I HAVE RECEIVED A COPY OF THE DUTY STATEMENT.

I CAN PERFORM THE ESSENTIAL FUNCTIONS OF THE POSITION WITH OR WITHOUT REASONABLE ACCOMMODATION:

☐ YES

☐ NO (Notice HR to discuss possible reasonable accommodation)

EMPLOYEE NAME (PRINT FULL NAME) ➡	EMPLOYEE SIGNATURE ➡	DATE SIGNED ➡
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SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THIS POSITION WITH THE EMPLOYEE.

SUPERVISOR NAME (PRINT FULL NAME) ➡	SUPERVISOR SIGNATURE ➡	DATE SIGNED ➡
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