

## Duty Statement Rank & File

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

Print or type.  
 See Specific Instructions on page 2.

A. Current Position Number <b>304-5157-001</b>	B. Probationary Period /JEP Period <b>12-Months</b>	
C. Incumbent Name <b>VACANT</b>	D. Classification/Job Title <b>Staff Services Analyst</b>	E. Date of Hire
F. Unit, Section, Division <b>Records Management and Appraisal Unit, Archives Division</b>		G. Location <input checked="" type="checkbox"/> Sacramento <input type="checkbox"/> Los Angeles
H. Name of Immediate Supervisor/Manager	I. Classification/Title of Immediate Supervisor/Manager <b>Staff Services Manager I / Records Management Manager</b>	
J. Bargaining Unit (CBID) <input type="checkbox"/> [B01]	K. Time Base <input checked="" type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Other	L. Tenure <input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Permanent Intermittent <input type="checkbox"/> Limited Term <input type="checkbox"/> Intermittent <input type="checkbox"/> Other
M. Work Schedule <b>Monday - Friday</b>	N. Work Hours <b>8:00 am – 5:00 pm</b>	
O. Background Check Required <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	P. Job Requires Driving Automobile <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Q. Certification Required <input type="checkbox"/> Yes <a href="#">Click here to enter text.</a> <input checked="" type="checkbox"/> 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 direction of the Records Management Manager, the Staff Services Analyst serves as a member of the California Records and Information Management (CalRIM) program under the broader Records Management and Appraisal (RMA) Unit within the Archives Division. Working directly with the Unit Manager, the member will engage and conduct outreach to diverse state and local government agencies. Assignments include research, review, and advise state agencies in the creation and revision of records retention schedules; teach records management classes; and work as a part of the team that administrates the State Records Management Act. This position provides program policy and regulatory recommendations to the Archives Management Team; advises local entities on records management and disaster preparedness; and other related assignments in support of the mission of the Division.

## ESSENTIAL FUNCTIONS

- 40%            **Records Management**  
The incumbent will complete a variety of assignments relating to records management, including but not limited to: 1) work with other members of the Records Management and Appraisal (RMA) Team to provide guidance to state agencies on issues relating to records retention schedules, records management, or similar items; 2) assist with initiatives to work with departmental officials and representatives of outside agencies to ensure that all agency records, irrespective of format (paper, electronic, digitally imaged, microform), are inventoried and scheduled, as required by law, that the retention periods are reasonable, and that the schedules are maintained on a current basis; 3) create tools and resources to encourage state agency compliance with the State Records Management Act; 4) work with other state agencies to perform outreach, monitor, review, and develop records retention schedules, advising on retention guideline suggestions, storage, confidential destruction, and supporting the timely and smooth transfer of records to the State Archives; and 5) other related duties.
- 35%            **Program Outreach, Education, and Training**  
The incumbent will develop digital and engaging collateral material for external partners. Member will complete program outreach, education, and training activities including but not limited to: 1) facilitate scheduling and logistics of records management training and education classes; 2) provide records management instruction for small to large sized groups, as needed; 3) assist with development of training tools and resources for classes for various different governmental entities; 4) maintain calendar and of classes and events for the Records Management Program; 5) assist with updates to records management resources; 6) ensure mailing and contact lists for agency records management coordinators and related staff are up-to-date; 7) distribute surveys and resources, as needed; 8) respond to general records management and records retention inquiries and questions; and 10) assist other RMA staff with projects, as needed.
- 15%            **Policies and Procedures**  
The incumbent will complete analysis and writing assignments relating to program policies and procedures and assist in the assessment of bills for legal analysis. Duties include but not limited to: 1) assist with research and analysis of existing and proposed records management policies, laws, standards, and procedures, including records protection, disposition; 2) analyze program monitoring and evaluation tools and develop recommendations to increase efficiency and effectiveness of overall program; 3) assist other staff in the RMA Unit with assignments to research and update the State Administrative Manual (SAM) entries and other state manuals related to records management; 4) assist in the analysis of program data and identify problems, issues, or successes that need management attention and draft proposed solutions, as needed; 5) research and prepare comprehensive written reports with recommendations, as requested; and 6) participate in special projects, as assigned.

**MARGINAL FUNCTIONS**

10%



**General**

Work directly with other Division staff; and stay abreast of current records management trends and best practices; research and prepare comprehensive written reports with recommendations and present orally to management when requested; serve as lead or participates in special projects, as assigned; attend required and job related training, conferences and meetings; and represent the Office of the Secretary of State at professional meetings and symposia. Effectively organize and coordinate day-to-day work to ensure that all assignments receive the appropriate attention and that established timelines are met. Attend meetings; maintain annual plan and daily workload reports; answer phones, receive and respond to email/mail requests; and make photocopies as needed. Appropriately refer existing or potential problems or issues to the supervisor.

**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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