

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Staff Services Manager I	OFFICE/BRANCH/SECTION Program Management	
WORKING TITLE Branch Chief, Program Management	POSITION NUMBER 913-350-4800-917	REVISION DATE 08/09/2024

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

**GENERAL STATEMENT:**

Under the direction of the Office Chief of Program Management, a Staff Services Manager II (Supervisor), the incumbent, a Staff Services Manager I (Supervisor), serves as a functional manager for Program Management of the 2070 Program (the Divisions of Traffic Operations and Safety Programs)

The incumbent is responsible for the resource management and monitoring of the Personal Services (PS) and Operating Expense (OE) budgets for the 2070 Program; for the development, implementation, and monitoring of external Information Technology (IT) and Non-Information Technology Consultant and Professional Services Contracts and Architectural and Engineering (A&E) Services Contracts for the 2070 Program; and for developing short and long-term plans and initiatives to improve operational efficiency and performance target-driven organizational excellence within the Office of Program Management and the 2070 Program.

**CORE COMPETENCIES:**

As a Staff Services Manager I, 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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 First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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 First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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- **Vision and Strategic Thinking:** Communicates the "big picture". Models the department's Vision and Mission to others. Influences others to translate vision into action. Future oriented, and creates competitive and break through strategies and plans. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
30% E	<p>Oversees 2070 Program resource utilization and compliance with fund types and appropriation mandates of the State Highway Account (SHA), Stormwater (SW), Reimbursement (Reimb), the Public Transportation Account (PTA), and Federal (FED) Funds. Uses Department Enterprise Web Applications (such as infoAdvantage, Enterprise Datalink, and AMS Advantage) along with the Microsoft Office 365 Suite (Power BI, Excel, Word, and PowerPoint) and similar database and visualization tools to create and oversee the preparation of resource reports for use by management and partners statewide.</p> <p>Oversees the preparation, review, and implementation of the annual budget development process for the 2070 Program. Develops and processes Budget Change Concepts (BCC), Budget Change Proposals (BCP), and Finance Letters (FL) in accordance with 2070 Program priorities and performance targets. Advises management and develops recommendations to prioritize, align, and redistribute statewide resources to ensure the 2070 Program's continuity in meeting current and future workload needs.</p>
25% E	<p>Oversees the development, review, implementation, and management of external IT and Non-IT Consultant and Professional Services Contracts and A&amp;E Services Contracts for the 2070 Program. Ensures 2070 Program compliance with procedures, regulations, policies, and manuals (such as the California Prompt Payment Act, the State Administration Manual (SAM), the Caltrans Accounting and Coding Manual, the DPAC Acquisition Manual, the State Contracting Manual, and Bid, Protest, and Dispute Procedures). Establishes and maintains a Service Contract database, documents relevant contract information, monitors contract expenditures, and ensures funding availability. Prepares reports and analyses, provides guidance, and makes recommendations on contract budgets (including allocations, encumbrances, and expenditures) to upper management for high level decision making.</p>
20% E	<p>Supervision: Supervises, coordinates, and oversees all Branch staff and operations (including onboarding/offboarding). Monitors branch workload, establishes priorities, and develops strategies to increase productivity and performance levels to achieve Branch and Office targets. Coordinates Office of Program Management resources to provide effective support services to the entire office.</p> <p>Coaches and mentors staff and creates opportunities for employee development. Provides staff with feedback on their job performance that entails constructive feedback through regular monitoring of their workload and productivity. Enhances employee morale and engagement by acknowledging good work and contributions through formal and informal appreciation efforts. Takes timely action and collaborates with the Offices of Discipline Services, Health and Safety, EEO, Human Resources, etc. for all disciplinary and personnel-related matters as appropriate. Processes timely probation reports, annual performance reviews, and annual training plans. Establishes and upholds employee expectations and telework agreements (if appropriate) and develops plans and tools to build employee strengths and close performance gaps.</p>

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20%	E	<p>Branch Functional Manager: Supports the 2070 Program with implementing strategic objectives. Supervises branch staff in innovation, research, and the operational improvement and implementation of new technologies and strategies to enhance budgetary management and performance monitoring. Establishes branch priorities that support the Office of Program Management with implementing 2070 Program Performance Target monitoring, analysis, and reporting.</p> <p>Supports the Office Chief with and supervises branch and other Office staff with statewide district meetings regarding resource and contract issues, Performance Targets, and 2070 Program priorities. Supports the Department's Fi\$Cal transition activities and ensures compliance. Identifies potential risks in resource and contract management processes and develops strategies to mitigate these risks, ensuring the protection of organizational interests. Facilitates effective communication and collaboration with internal and external stakeholders to ensure smooth resource and contract management operations. Leverages technology, software tools, and Caltrans' Enterprise Web Applications (such as InfoAdvantage, AMS, and DataLink platforms) to ensure and enhance the efficiency, legitimacy, and effectiveness of resource and contract management processes. Stays updated with industry best practices and innovations.</p> <p>Collaborates with the Office Chief and other 2070 Programs staff to pursue federal grants and research opportunities. Prepares correspondence, reports, PCINs, and resource-related information. Updates executive management and responds to Control Agency inquiries.</p>
5%	M	<p>Leads and completes a variety of special projects and assignments as needed by the Division Chief, Deputy Division Chief, and Office Chief. Performs other work commensurate with the Staff Services Manager I (Supervisor) classification. May occasionally act as the Chief, Office of Program Management.</p>

<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**

Directly supervises a team of analysts and other rank and file staff. May supervise retired annuitants and student assistants. May occasionally act as the Chief, Office of Program Management.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Must have knowledge of: Principles, practices, and trends of public and business administration, including management and supportive staff services such as budget, personnel, management analysis, planning, program evaluation, or related areas; principles and practices of employee supervision, development, and training; program management; formal and informal aspects of the legislative process; the administration and department's goals and policies; governmental functions and organization at the State and local level; department's Affirmative Action Program objectives; and a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Must have the ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; review and edit written reports, utilize interdisciplinary teams effectively in the conduct of studies; manage a complex Staff Services program; establish and maintain project priorities; develop and effectively utilize all available resources; and effectively contribute to the department's affirmative action objectives.

Must have the ability to supervise multi-disciplinary, technical staff. As a supervisor, requires knowledge of and the ability to implement principles and techniques of personnel management and supervision; the supervisor's role in equal employment opportunity, health and safety, personnel-related, and labor relations programs; and the processes required to meet their objectives. Requires the ability to communicate effectively (both orally and in writing) with multiple audiences; establish and maintain cooperative relationships with individuals and organizations contacted in the course of work; participate in public contact and represent Caltrans; serve in a consulting capacity to other divisions and districts; and respond appropriately to difficult situations.

Must be able to apply sound judgment in problem solving; work productively in a busy and often changing environment; perform multiple tasks simultaneously; maintain a project schedule; accurately and timely follow-up on issues; and effectively interact with

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many levels of people in a cooperative manner. Must be decisive, take appropriate actions, and complete tasks or projects with a short notice. Requires proficiency with Microsoft (MS) Office programs (including MS Word, MS Excel, MS PowerPoint, MS Outlook, MS Teams), Adobe Acrobat, Cisco WebEx, and using the Internet.

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**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

This position is responsible for making independent action and taking initiative to carry out assigned duties. The incumbent's decisions and actions have a direct impact on the Traffic Operations Program and the Department. Inability to carry out this position's responsibilities could result in: adversely affecting public safety and/or result in tort liability for Caltrans; increased expenses resulting from lost Transportation System productivity; litigation that could delay and/or add substantial cost to essential projects or activities; inability to quantify performance in meeting the Department's strategic goals and safety and mobility commitments; loss of credibility and public confidence in Caltrans as a responsible public agency.

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**PUBLIC AND INTERNAL CONTACTS**

The incumbent must maintain the highest level of professionalism and integrity, exhibit tact and diplomacy, and effectively communicate with all internal/external contacts.

Internal contacts include various Caltrans districts and divisions (including Design, Construction, Maintenance, External Affairs, and Engineering Services). External contacts include the Legislature, Governor's Office, CHP, FHWA, construction industry representatives, local agencies, other states, national experts, academia, the private sector, and the general public.

The incumbent must communicate effectively orally and in writing, by telephone, via email, and by web conferencing. The incumbent is also required to facilitate, participate in, and host meetings.

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**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

The incumbent must: quickly adapt behavior and work methods in response to new information/priorities and unexpected obstacles; multi-task; effectively interact with many levels of people in a cooperative manner; be decisive; take appropriate actions; and complete tasks or projects with a short notice. Must be able to maintain focus and intensity, yet remain optimistic and persistent, even under adversity. The incumbent shall act in a fair and ethical manner toward others; value cultural diversity and other individual differences in the workforce; and demonstrate a sense of responsibility and commitment to public services. The incumbent must be able to develop new insights into situations and apply innovative solutions to make organizational improvements; grasp the essence of new information and master new technical and business knowledge, particularly in the area of outreach; and facilitate and maintain a work environment that encourages creative thinking and innovation.

Must have the ability to work with a computer and have manual dexterity. Required to sit for long periods of time using a computer, monitors, phone, and other office equipment. The incumbent must be able to occasionally lift up to 25 pounds without assistance. Bending, stooping, and pulling may be required within the normal course of performing some of the responsibilities associated with this position. May be required to speak in front of large groups.

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**WORK ENVIRONMENT**

This position's headquarter location is Sacramento, CA. While at the base of operation, the incumbent works in a climate-controlled office under natural and artificial lighting. Due to periodic issues with heating and air conditioning, building temperatures may fluctuate. Multi-floor buildings are equipped with elevators and stairs.

The incumbent is required to travel periodically to other office buildings (federal and state offices, district offices, local agencies, etc.) and indoor/outdoor field locations. While at field locations, the incumbent may be exposed to uneven surfaces, noise, and varying climate conditions. The incumbent is required to travel within the state and may be required to travel out-of-state for business operations. Possession of a valid driver's license is required to operate a State owned, leased, and/or personal vehicle. The environment is fast-paced, demanding, and busy; and requires considerable flexibility in managing time, priorities and assignments. Vacations may be restricted during peak times.

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 headquarter location as needed to meet operational needs. Business travel may be required and reimbursement considers an employee's designated headquarter location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to

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the headquartered location will be the responsibility of the selected candidate.

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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.)

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EMPLOYEE (Print)

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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.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE

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