

Duty Statement Manager (Excluded)

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

Print or type.
See Specific Instructions on page 2.

A. Current Position Number 785-557-4800-001	B. Probationary Period /JEP Period 12 Months	
C. Incumbent Name TBD	D. Classification/Job Title Supervisor I, Customer Service Manager	E. Date of Hire XX/XX/XXXX
F. Unit, Section, Division Political Reform Division		G. Location ☒ Sacramento ☐ Los Angeles
H. Name of Immediate Supervisor/Manager Chris Fultz		I. Classification/Title of Immediate Supervisor/Manager Supervisor II
J. Bargaining Unit (CBID) ☒ S01	K. Time Base ☒ Full Time ☐ Part Time ☐ Other	L. Tenure ☐ Permanent ☐ Permanent Intermittent ☒ Limited Term ☐ Intermittent ☐ Other
M. Work Schedule M-F	N. Work Hours 8:00 AM to 5:00 PM	
O. Background Check Required ☐ Yes ☒ No	P. Job Requires Driving Automobile ☐ Yes ☒ No	Q. Certification Required ☐ Yes Click here to enter text. ☒ No

Section II JOB DESCRIPTION

DESCRIBE THE ORIGINAL SETTING AND MAJOR FUNCTIONS

Under the overall direction of the Division Chief, Assistant Division Chief, and general direction of the Supervisor II, the Customer Service Manager, a Supervisor I, plans, organizes, and directs the work of staff responsible for handling internal and external stakeholder phone calls, emails, in-person appointments, requests, and organizing statements and reports received by mail and email.

The incumbent will be an integral part of a collaborative management team and expected to contribute in a meaningful way to the operations of the Division. Additionally, they must have a working knowledge of standard administrative policies and procedures and acquire an in-depth understanding of the statutes, regulations, and policy directives governing the programs and projects within their purview.

ESSENTIAL FUNCTIONS

- 30% ☒ **Supervision and Leadership**
Supervises and gives direction to staff performing a variety of the analytical, technical, and administrative functions performed in the unit. Provides direction, guidance, and performance evaluations identifying, addressing, and resolving employee performance issues. Ensures staff adherence to policies, procedures, and regulations. Leads and/or participates in the recruitment, hiring, and training of new staff within the unit. Ensures a safe and productive work environment. The incumbent will become proficient in the functional

requirements of the CAL-ACCESS system and provide administrative support for multiple supervisors, the Assistant Division Chief, the Division Chief, and legal counsel while their work is being re-directed to the CAL-ACCESS Replacement System project.

- 20% ☒ **Program and Project Management**
Ensures compliance with existing and new laws and regulations using data to inform decision-making and policy development. Analyzes existing policies and procedures to identify areas for improvement. Develops new policies and procedures to enhance program efficiency and effectiveness. Acts as a liaison between their unit, the Political Reform Division, the Secretary of State and other governmental agencies, organizations, and the public. Sets goals and objectives for programs and projects in alignment with the Political Reform Division and Secretary of State's Strategic Plan. Evaluates progress towards goals and review and revise as needed to ensure completion.
- 20% ☒ **Collaboration**
Participates as a member of the Division's management team to improve operational efficiency and ensure operational consistency with other Political Reform Division units and within the Secretary of State. Assists in budget preparation, tracking, and projections. Recognizes the importance of and incorporates diversity, equity, and inclusion within the work environment. Knows when to seek assistance and involve other members of the management team.
- 20% ☒ **Customer Service**
Ensures high-quality service is provided to filers, internal and external stakeholders, and the public. Uses good judgment to address customer complaints and resolve complex issues in a timely manner. Drafts, edits, and evaluates outgoing communications for accuracy, completeness, and accessibility. Provides administrative support to the Division by reviewing and approving timesheets, managing the student assistant budget, schedules and assigned duties. Backfills other manager's tasks as needed. Ensures the PRD office is organized, clean, all ADA needs are met, filings are in the correct locations and manages purge activities. Review daily cash reconciliation report for accuracy before delivery to the Fiscal office.

MARGINAL FUNCTIONS

- 10% ☒ Acts as backup and support for staff. Perform other related duties within the scope of the position as required to meet ongoing needs of the organization.

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
▶	▶	▶

SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THIS POSITION WITH THE EMPLOYEE.

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