

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Staff Services Manager II, S	OFFICE/BRANCH/SECTION District 10/Administration/Business Operations	
WORKING TITLE Business Operations Chief	POSITION NUMBER 910-001-4801-001	REVISION DATE 09/11/2024

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 general direction of the Assistant Division Chief, Administration, the incumbent has overall responsibility for managing, directing, organization, and planning the District Business Operations Office. This includes budgetary control and fiscal responsibility for the Administration Program, Personnel, Hiring, Clerical, Facilities, and Resource Management. Specific responsibilities extend to expenditure authorization, fund certification, project control, position management, property control, control agency report reconciliation, facility management and forecasting.

CORE COMPETENCIES:

As a Staff Services Manager II, S, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Integrity)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, 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. (Safety First, Cultivate Excellence - Engagement, Equity, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - 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, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence - Engagement, Equity, Integrity)
- **Conceptual Thinking:** Ability to find effective solutions to issues by taking the appropriate perspective (i.e., holistic, abstract, or theoretical). (Safety First, Cultivate Excellence - Equity, Innovation)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Integrity)

TYPICAL DUTIES:

Percentage	Job Description
40% E	Manages technical staff in performing the functions within Finance, Position Management, e.g. Personal Services and Operating Expense dollars for all programs; Personnel, Hiring, Clerical, Facilities, Property Control, Auto Pool, GPS, and Resource Management. The manager is also responsible for all phases of encumbrance and fund certification for all programs, Position Reconciliation, preparation and analysis of the POBE and PTAS reports, and analysis of the various databases, reports, and reporting systems.

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30%	E	Incumbent is directly responsible for planning, directing, and controlling all aspects of the District budget process. Provides advice and assistance to District Executive Staff and program advisors on project funding sources and program definitions, and develops and effectively utilizes all resources. Incumbent is responsible to manage the Delegated Maintenance budget and schedule in the best interest of the District. Responsible to monitor Property Control to ensure compliance. Incumbent is responsible to ensure reports are accurate prior to submittal. The incumbent has direct responsibility for planning, directing, and controlling all aspects of the District facilities process. Provides advice and assistance to District Executive Staff and program advisors on facility issues, repairs, updates, leases, utilities, and security.
15%	E	Incumbent is responsible to oversee preparation of the District Staffing Plan, manages and controls the operating and personnel budget. The Budgets Office Chief has prime responsibility for direct negotiations with all the District Deputy Directors regarding allocations and provides Executive Staff with the annual fiscal plan to manage resources .
10%	E	Manages staff through ongoing goal setting and feedback in the development of the District's yearly activity plan and management of the District's personnel/operating support budget to ensure program delivery.
5%	M	Responsible for monitoring the Administration and Chargeback programs and reviewing monthly reporting to the Deputy District Director of Administration.

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

Directly supervises staff and may be asked to act for the Deputy District Director of Administration and the Assistant Division Chief of Administration for short periods of time. The incumbent may be temporarily rotated to the same classification in another unit within the District in order to support and meet organizational needs.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

A comprehensive knowledge of District and Departmental programs areas, e.g. Capital Program, expenditure authorizations, fund certification, project control, position management, consultant services, fiscal reports reconciliation, budget development, and related administrative processes.

Must have the knowledge of general business practices related to the principles and techniques of facility operations, facility planning, security, and customer service. Must have comprehensive knowledge of the Department's entire development and control process, applicable Federal, State, local and departmental laws, rules, regulations, codes and/or statutes. Must have knowledge of the basic concepts and principles of accounting and cost control and the laws relating to financial administrative of state government; procurement and project management as well as the ability to learn contract management principles and practices.

Requires knowledge of the hiring process; a supervisor's role in the hiring process; basic principles, practices, and trends of public and business administration; position control; and a basic understanding of personnel transactions.

Must possess the ability to prepare clear and concise reports, communicate effectively, both written and orally with all levels of staff, negotiate effectively, deal tactfully with all parties in stressful situations, make timely decisions, prioritize critical programs, and excel in conflict resolution. Must be able to effectively select, train, motivate, and manage staff.

Must possess strong analytical skills with a special emphasis on accurate interpretation of budget information and ability to forecast probable events and expenditures.

Must demonstrate ability to: Analyze and solve the most difficult problems within the division, 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, both orally and in writing; and negotiate and discuss technical business management office subject matter with vendors, contractors and other governmental agencies.

Must possess knowledge of: the laws, principles, practices and trends of training, quality, budgeting, public administration, safety and health, Department policy, current management and supervisory principles and all pertinent laws, rules and MOU, general office procedures, computer terminology, principles of accident prevention and safety practices.

Must be knowledgeable on budgetary issues, funds monitoring, various Caltrans procurement methods, have strong knowledge of and/or the ability to learn, Caltrans Info-Advantage/Datalink. Able to utilize computer technology to perform work duties.

Must understand the principles and practices of employee supervision, development and training.

Must have the ability to develop an effective team of subordinates to provide support services to the District.

Must be able to establish guidelines and controls to assure that activities are being effectively accomplished.

Must be an effective team member, and must be able to communicate effectively, both orally and in writing. Open communication is critical with District, Support District, Headquarters management and staff.

Must have excellent communication skills and present ideas and information effectively, both in oral and written formats; must be able to present the Department effectively in a variety of complex and sensitive environments.

Must effectively contribute to the Department's Equal Opportunity objectives.

Must possess the following analytical requirements: analyze and understand the implications of law, policy, rules, contracts and

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legislation pertaining to Caltrans activities.

Must be able to develop and evaluate a variety of alternatives when faced with management challenges and be able to prepare and present findings and recommendations.

Must be able to identify and analyze problems related to monitoring a budget, confidentiality, and respond to management in a timely manner. Must be able to evaluate and consider all factors and effectively develop action to react to any changes.

Must be able to reason logically and creatively and utilize a variety of analytical techniques in developing realistic conclusion and effective solutions to complex problems.

Must be able to recognize potential programs and initiate or make recommendations for corrective measures.

Must be able to research, analyze and make recommendations on a broad range of general administrative issues and problems.

Must 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. Must have knowledge of the basic concepts and principles of accounting and cost control and the laws relating to financial administrative of state government.

Must have the ability to analyze data, develop and evaluate alternatives. Must possess the ability to express and present ideas and information effectively, develop and maintain good working relationships with management, staff, the general public, and community organizations.

Must have the ability to make presentations, use of good judgment for project analysis and be able to handle multiple priorities.

Must have the analytical skills to handle a variety of personnel and management problems. Must be able to analyze situations in an impartial manner, develop alternatives and recommend an effective course of action.

Should be familiar with modern technology and its application in the Department.

Must be able to develop and maintain collaborative relationships with internal and external customers; handle sensitive and confidential information; conduct investigations; prepare and deliver presentations to small and large groups; act in a lead capacity; prepare clear, concise reports with meaningful statistical data; be proficient in using a computer with programs such as Word, Excel, Access, etc.

Ability to analyze various situations that arise and determine an effective course of action. Must be able to prioritize workload to meet deadlines. Analytical skills are necessary in order to research and accurately apply appropriate laws, rules and policies and make sound recommendations.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent will be responsible for a continuing array of complex fiscal decisions that are fundamental to the effective operation of the District, such as allocation of positions and operating expenses. The incumbent is also responsible for overseeing all aspects of the hiring process, to ensure that the District does not overrun its position allocations. Failure to exercise correct and timely decision-making would adversely affect the delivery of the District's program and put the District and Department in violation of both Federal and State regulations on the expenditure of funds. Sanctions could potentially be imposed or millions of Federal Highway dollars could be lost. Incumbent is responsible for ensuring that all transactions and requirements are within appropriate delegations. In addition, incumbent is responsible for implementing policy, establishing work priorities and training employees in the units under his/her supervision. Inappropriate decisions and recommendations can have a direct, adverse impact on the departmental program which could result in the loss of effectiveness in those programs, including over or under expenditures of funds. This could cause embarrassment and possible loss of the use of funds, adversely impact future funding levels, and loss of delegations. Incumbent has responsibility for providing a positive image of the Department. Must be receptive to sudden change and apply initiative to incorporate changes and resolve problems with minimal disruption to the District. As a management liaison, must maintain excellent working relationships with other managers to assure reputation and credibility of the District remains impeccable.

PUBLIC AND INTERNAL CONTACTS

Incumbent has internal contacts with all levels of District and Headquarters staff. The incumbent will routinely advise District Executive Management on critical budgetary and facility issues and has primary responsibility for making and/or recommending action, and responding to inquiries from control agencies and audit staffs. Incumbent is responsible to independently consult with and advise other employees on the technical services available within the Office of Resource Management, Facility Management and District Hiring Services. Handles the more difficult queries with competence and integrity. Incumbent must be able to communicate effectively with Headquarters' functional managers, regional managers, district managers and supervisors, and individual employees while negotiating. Incumbent must have good communication, telephone and e-mail skills and be able to deal with others in a courteous and professional manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees 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. Must be able to develop and maintain cooperative working relationships, recognize emotionally charged issues, problems or difficult situations and respond appropriately, tactfully, and professionally. Must be able to work independently. The incumbent will be required to move about in their daily supervisory activities on different floors and in multiple buildings. The incumbent will have to concentrate on highly technical details and successfully implement solutions. The incumbent will be expected to be emotionally and mentally capable of responsibly caring for state resources under their control and treating others with courtesy and respect. Must be able to determine and execute an effective course of action while under pressure. Must be able to organize and prioritize

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large volumes of varied documents and tasks. Must be able to sit and/or stand for long periods of time and perform tasks utilizing a personal computer and telephone. The workload is subject to frequent, substantial, and unexpected changes within a short time period. Requires ability to resolve emotionally charged issues reasonable 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. Must be able to create a work environment that encourages creative thinking and innovation. May also be required to speak in front of large groups or represent the department at various meetings. Employee will be required to sit for long periods of time using a computer keyboard and terminal, or while traveling in a vehicle; must have ability to develop and maintain cooperative working relationships; be a self-starter; respond appropriately in difficult situations.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee's designated Headquarters 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.

Incumbent will work in a climate-controlled office under artificial lighting; however, due to unexpected heating and air conditioning problems, building temperature may fluctuate.

Will also be required to travel to field office locations, District Offices, Headquarters, other districts throughout the state to attend meetings or trainings. Occasional overtime, night work, and overnight travel may be required.

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

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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