

Duty Statement Manager (Excluded)

Proposed
(Submit to HR for Review)
 Final

Print or type.
See Specific Instructions on page 2.

A. Current Position Number 302-4800-001	B. Probationary Period 12 month-Probationary Period	
C. Incumbent Name VACANT	D. Classification/Job Title Staff Services Manager I / Reference Services Manager	E. Effective Date
F. Unit, Section, Division Research Services Unit, Archives Division		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 SSM II / Archives Services Manager
J. CBID S01	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 Monday – Friday	N. Work Hours 8:00 am – 5:00 pm	O. Work Week Group E
P. Background Check Required <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Q. Job Requires Driving Automobile <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	R. Certification Required <input type="checkbox"/> Yes Click here to enter text. <input checked="" type="checkbox"/> No

Section II JOB DESCRIPTION

DESCRIBE THE ORIGINAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Archives Services Manager (SSM II), the Reference Services Manager (SSM I) is responsible for the public facing functions carried out in the Research Services Unit. The incumbent ensures timely responses to patron requests and fosters an environment of excellent customer service. The Reference Services Manager provides direct supervision to a team of professional archivists, and support staff that coordinate the services provided in the Research room and at the reception desk. The incumbent provides oversight of the public disclosure of historical records; oversees PRA requests, works in conjunction with the legal office on complex and restricted records requests under the Information Practices Act (IPA) and Public Records Act (PRA), and coordinates other special projects as requested.

ESSENTIAL FUNCTIONS *

40% Administration

Provides direct oversight of all activities and services provided by the Research Services Unit, which include reference desk services, the day-to-day operations of public service counters, including the reception desk and Research Room. Identifies strategic goals for the unit that align with the Agency’s goals and objectives. Supports

and promotes a culture of continuous process improvement leveraging technology. Ensures Unit policies and procedures are current and directs the reporting of facility issues and concerns to SOS-Business Services; implements the mission and goals of the Division; and ensures the effective and efficient use of Division resources.

40%



Supervision

Directly supervises the work of the unit; evaluates the performance of staff; reviews workload reports; ensures public counter staffing; ensures projects, assignments, and work activities are completed accurately and in accordance with deadlines; provides coaching and mentoring to staff, and coordinates with SOS Human Resources on progressive discipline. Creates a collaborative work environment through team-based projects, regular meetings, knowledge and idea sharing, team building activities, and employee recognition. Ensures staff are provided customer service training; regular 1:1 meetings, opportunities for job shadowing, cross-training, and promotes the use of upward mobility resources such as Individual Development Plans.

MARGINAL FUNCTIONS

15%



Policy Development, Public Disclosure, and Professional Activities

Works in collaboration with internal and external stakeholders on significant research projects, policy analysis, and discovery regarding public disclosure of historical records. Leads and coordinates responses to PRA requests; works closely with legal staff in response to PRA requests involving complex records excluded from public disclosure under the Information Practices Act and Public Records Act. Coordinates other special projects, as requested. Reads professional literature; attends 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 policies and procedures; prepare reports for upper management; attend meetings and training sessions.

5%



Perform other duties as required consistent with department needs.

May travel to attend conferences or meetings, as needed. Performs other duties as assigned.

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
▶	▶	▶