STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Governmental Program Analyst	DBFS/Business Services & Security/Business Services	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Statewide Forms Coordinator	702-035-5393-xxx	12/01/2014

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the direction of the Branch Chief, a Staff Services Manager I, the incumbent independently performs the more complex and varied technical and analytical tasks associated with the Department's Forms Management Program. The incumbent will oversee forms development, design, revision and maintenance of all departmental forms. The incumbent will consult with customers to analyze and advise on the optimal design/layout enhancements to meet desired job specifications. Incumbent serves as the Department's technical expert and consultant and has statewide oversight responsibilities for the effective and efficient administration and operation of the program.

TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M)[1]	Job Description
45%	E	Provide technical and consultative services to Caltrans staff and management on all aspects of the Forms Management Program. Ensure consistency with departmental policies, administrative mandates, and legal requirements (e.g., Information Practices Act and Americans with Disabilities Act (ADA)). Oversee complex analysis, evaluation, research, and study of Caltrans forms using advanced electronic business solutions and methods to enable the statewide Forms Management Program to comply with mandated objectives and responsibilities. Review and approve new and revised forms, analyze elements such as logic, flow, and readability of form content necessary to produce quality products. Make recommendations to program staff for proper form specifications, content, design, and consistency to ensure compliance with forms regulations, which best serve end users. Recommend, develop, and implement policies, procedures, and other improvements to the centralized Forms Management Program as well as other administrative functions assigned to facilitate standardization, operating efficiency and effectiveness.
25%	E	Administer the Caltrans Electronic Forms System (CEFS) database to maintain an accurate forms repository. Evaluate departmental specific forms to ensure forms are in compliance with all laws including Government Code sections 14770-14775. Collaborate with the Department of General Services (DGS) Forms Management Center to modify standard (STD.) forms. Consult and train Caltrans Division Forms Officers on using established or modified guidelines, design, development, and modification of internal electronic forms. Ensure that all Caltrans internal and external forms are ADA compliant.
25%	E	Evaluate, examine and prepare complex and comprehensive time-sensitive statewide analytical reports and documents in response to legislative bill analyses, memorandums of understanding, policies, procedures, and workload reports for review and approval by the Branch Chief. Prepare program analysis reports identifying scope of work, workload requirements, timelines, alternative courses of action, and pros and cons outlining recommended business solutions. Recommend and implement strategies promoting the statewide transition to, and deployment of, electronic publishing solutions to ensure the financial stability of the statewide Forms Management Program.
5%	M	Update and maintain CEFS website. Collect and analyze data to create the Annual Forms Inventory report mandated by DGS. Compare data received from districts/divisions with Forms Management Unit (FMU) forms database. Identify forms that have not been processed by the FMU, are obsolete, and/or non-compliant. Provide weekly written status reports to management.

[1]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.

ADA Notice For individuals with sensory disabilities, this document is available in alternate formats. For information, call (916) 445-1233, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

The incumbent does not supervise, however the incumbent may act in a lead capacity. The incumbent provides guidance to Division Forms Officers regarding the Forms Management Program.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have a thorough and comprehensive working knowledge of all laws and regulations relating to records management, including the California Public Records Act, Information Practices Act, Americans with Disabilities Act, State Administrative Manual, and Departmental Deputy Directives. The incumbent must possess a thorough knowledge of records and forms management theories and techniques relating to records retention, archive storage, and electronic forms. The incumbent must be knowledgeable of current records and forms management technology, including computer-assisted retrieval and electronic forms systems.

The incumbent must have the ability to work cooperatively with people both in person and through telephone communication, and the ability to collect and analyze data, prioritize, categorize and summarize information. Strong verbal communication skills are required, as well as the ability to write clear and concise correspondence. The incumbent must have the aptitude for using automated office equipment, database software computer programs and the capacity for creative thinking. The incumbent must be proficient in the use of Adobe Acrobat Professional, Adobe Reader, Adobe Dreamweaver, Adobe LiveCycle Designer (advanced form features to create Caltrans internal forms), Microsoft 2007 – Excel, Power Point, and Word; Paint, Publisher, and Visio.

The incumbent is required to analyze and implement all forms related procedures and equipment to increase the Department's productivity and to work diplomatically as a team member with all levels of staff.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent exercises the highest degree of judgment in determining the most appropriate technique, preparation, and set up for the electronic files for production. The incumbent is responsible for ensuring efficient and effective management of records and forms. Ensure compliance with State and Federal guidelines. The use of poorly designed or duplicate (in nature) forms may waste public and employee time and could cost the Department millions of dollars from delays to projects or from law suits due to lack of clarity.

PUBLIC AND INTERNAL CONTACTS

The incumbent will communicate on a regular basis with all levels of departmental staff to resolve complex forms management issues. The incumbent will also communicate regularly with DGS, the general public and outside vendors and contractors.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: The incumbent may be required to sit for long periods of time using a keyboard and monitor.

Mental: The incumbent must have the ability to multi task, adapt to changes in priority and focus for long periods of time. Must be able to organize and prioritize work assignments.

Emotional: The incumbent must have the ability to develop and maintain cooperative working relationships, respond appropriately to multiple workload requests and conflicting deadlines. The incumbent must have the ability to resolve emotionally charge issues reasonably and diplomatically.

WORK ENVIRONMENT

The incumbent will work in a climate-controlled modern office setting of mixed hard-walled and modular furniture design. The primary work space is of modular design under artificial light, containing computer and telecommunications equipment. Due to periodic problems with the heating and air-conditioning, the building temperature may fluctuate.

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.)