

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Staff Services Manager I (Specialist)	OFFICE/BRANCH/SECTION District 56/Maintenance/Budgets & Admn/Strategic Planning	
WORKING TITLE Strategic Planning Manager	POSITION NUMBER 913-660-4800-XXX	EFFECTIVE DATE

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 general direction of the Assistant Division Chief, Administration (Staff Services Manager III), the Staff Services Manager I (Specialist) is responsible for development of new business processes to incorporate recommendations from strategic planning efforts, direction of the development and implementation of maintenance and organizational business processes and performance reviews, annual performance plan development, program level action plan and reporting tools, and ensuring consistency with the Department's strategic, organizational, asset management and performance plans and objectives.

TYPICAL DUTIES:

Percentage	Job Description
30% E	<p>Maintenance Core Strategic and Business Planning. Responsible for review, analyses, recommendation and development of final products for a variety of business and organizational processes for the statewide Maintenance Program. Responsible for preparation of the Maintenance Annual Performance Plan and development of an implementation plan for performance tied to the annual Maintenance Budget Model. Represents the Division in developing, and reporting progress on meeting objectives in Planning Level Action Plans (PLAP) and for organizational performance measures. Responsible for oversight of business processes and process reviews to continually improve Maintenance functions and to integrate new strategic planning and asset management recommendations from core functions into business processes. Will evaluate progress towards established performance goals and, with the management team, recommend effective strategies to address deficiencies. Analysis of maintenance data, effective presentation and display of information, and ability to evaluate and monitor Maintenance Program planning activities in partnership with expert Maintenance functional program managers. Will organize and lead multi-functional teams for business process review and improvements to processes and tools.</p> <p>Independently develop and implement plans, alternatives and recommendations for the Maintenance Core Program Strategic Plan, Asset Plan and Business Plan. Coordinate with Maintenance Program managers in developing the Program's PLAP. Develop concept Business Plans including resources and performance measures. Organize information gathering with Office Chiefs and develop final Business Plan for all Maintenance Core areas. Submit final Business Plan to Maintenance Office Chiefs, Maintenance District Deputies, and interested others for review and comments. Monitor approved Business Plan implementation and performance measures.</p>
30% E	<p>Program Business Plan and Performance Measures. Provide identification, formulation and ongoing revisions to the Program Business Plan, including new strategic objectives, appropriate strategies for implementation and valid performance measurement development. Establish systems for compiling and tracking performance measures, and validating results. Develop and track results of Public and Customer Surveys and Condition Surveys to refine Level of Service Report Concepts. Develop and issue quarterly Performance Measures Reports for internal and external multi-disciplinary stakeholders and customers. Responsible for development of a Maintenance quarterly report and automated dashboards documenting performance.</p> <p>Develop asset management cost effectiveness analysis as a systematic process of maintaining the physical assets as it relates to system performance and the budget model for internal and external multi-disciplinary stakeholders and customers.</p>

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Develop management information collection tools, identifies best practices for compiling, tracking, and validating performance measures and results using management indicators, workload standards, and tools related to Maintenance. This will include development of dashboard models that will be ongoing performance indicators for the Maintenance statewide program tied to the Budget Model. Lead development and implementation of Maintenance Program management indicators and workload standards consistent with the Departmental and Program Strategic Plans. Develop tracking system for established statewide management indicators and monitors Program progress toward achieving its goals and objectives. Participates in policy development by the management team to implement related efforts. Develop Maintenance Program Plan, organize statewide implementation and ensure consistency with Department's Strategic Plan. Develop various communication plans with management teams for common understanding in the Division and Districts on management indicators, expectations, workload standards, and performance measurement. Consult with other Divisions, such as, Transportation Planning, and Project Management on related performance objectives.

- 15% E Performance Process Review. Coordinate implementation of statewide Maintenance Program Business Process Reviews (BPR's), in consultation with management team, for operational and system performance. Provide guidance and direction to implementation teams in Headquarters and Districts. Coordinate with other impacted Divisions. Develop schedules and work plans for Steering Committee to prioritize and sequence implementation tasks. May lead implementation teams. Participate as part of the management team in developing new process flows, policies, procedures, guidelines, templates, position descriptions, and other tools. Develop training materials and communication plans for rolling out changes within Headquarters Divisions and Districts. Deliver or direct training and work with impacted personnel to ensure a smooth transition. Monitor implementation and consistency across districts. Identify affected stakeholders and lead development of a communication plan for obtaining stakeholder participation and support.
- 15% E Integrate the Strategic and Business Plans with the Maintenance Budget. Maintain complementary integration of the Program Strategic and Business Plan with the Maintenance Program Budget Model. Coordinate with Program Budget staff to integrate annual planned actions with available resources, assist in quantifying outstanding needs and availability to support implementation. Prepare Program Level Action Plan. Analyze statewide program activities to carryout the Plan. Monitor resource levels compared to statewide and district action plans. Coordinate with multi-disciplinary Divisions and Districts to determine impacts of the action plans and review joint action plans needed.
- Work with Program Budget staff to assist in the development of Budget Change Proposals (BCPs), where needed, to facilitate implementation of the Strategic and Business Plans. Also will work directly with the Maintenance Program management team and other programs, budget and administrative staff to develop performance based Budget Change Proposals (BCPs) and Finance Letters (FL) required to implement the Maintenance Program Strategic and Business Plans. Provide support information to Budgets Program. Provides support information to Budgets Division. In consultation and coordination with the management team, analyzes related State and Federal transportation planning law and regulations for new requirements and impacts related to Maintenance, identifies resource needs, and organizational change needs to meet them. Plans, organizes, and conducts research on related organizational BPR; prepares reports and makes recommendations to the Maintenance Program on a variety of transportation planning, financial and budgetary topics. Coordinates with Division of Transportation Planning on related areas for system and corridor management efforts.
- 5% M Internal and External Customer Survey. Oversee administration of the external customer survey, gathering information to identify areas of success or concern for the Maintenance Program employees and publish periodic results each year that quantify areas of success or concern. Plan, develop and implementation of statewide Maintenance Program plan to address external customer

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survey. Plan, develop and implement Division plan to address internal customer survey.

5% M Prepare correspondence and respond to inquiries. May attend meetings or conduct meetings in the Assistant Division Chief's absence on related topics.

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

None. The incumbent may function as a lead person on complex assignments, organize the work of peers, or oversee special assignments.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of the 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 development, and training; program management; formal and informal aspects of the legislative process; the administration and department's goals and policies.

The incumbent must 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.

The incumbent must have knowledge of the research methods and techniques including conducting or participating in, economic, fiscal, legal, and political issues; as well as a demonstrated ability to use effective public participation techniques. Must have knowledge of the Department's mission, organization, policies, and procedures; Federal and State laws and regulations; concepts and terminology relating to asset management and planning; sources of funding transportation programs; the Department's budgeting process; principles and techniques of selecting outside consultants; and the processes available to meet program objectives.

The incumbent must have the ability to gather, compile, analyze, and interpret data; reason basically and creatively; develop formats to present and display data; use a variety of analytical techniques to propose solutions to or provide information regarding transportation problems; develop and evaluate alternatives; present ideas effectively orally and in writing. Must have the ability to work effectively with others as an interdisciplinary team member; establish and maintain effective and cooperative working relationships with those contacted during the course of the work; conduct studies; analyze problems and develop appropriate solutions; recommend effective courses of action; evaluate general planning proposals. Must have the ability work independently on complex planning projects; organize and direct the work of a staff engaged in a variety of planning activities; evaluate and monitor work of consultants; communicate effectively with other agencies, public, and the media.

The incumbent's abilities must include analysis and interpretation of maintenance data, effective presentation and display of information, and ability to evaluate and monitor Maintenance Program asset management and planning activities in coordination with expert Maintenance program managers. The incumbent must be able to organize and lead multi-functional teams for business processes and improvements to business processes and tools. They must work effectively and tactfully with all levels of departmental staff. The incumbent must possess a working knowledge of strategic and business planning processes and the departmental strategic planning process, in particular. The incumbent must be an effective public speaker and be able to communicate planning and business concepts and techniques effectively. The incumbent must work independently to carry out these complex activities, be proficient with personal computers and various software programs and maintain a level of professional integrity to ensure that the best interests of the Maintenance Program and Department are served; exercise good judgment; and establish and maintain project priorities. The incumbent must be able to work with budget data tied to performance data and must develop charts and graphs for reports. The incumbent must be able to complete projects under tight timeframes involving non-negotiable deadlines.

The incumbent must have a high level of expertise in communicating effectively both in writing and orally; making

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effective presentations, working cooperatively with all management levels; negotiating resolutions to issues or problems; and be prudent in dealing with conflicting interests at any level.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for leading the development of the annual business planning processes and implementing critical elements leading to the overall accomplishment of the Maintenance Program goals and objectives statewide. The incumbent will be responsible for ensuring that plans, indicators, standards and models accurately represent program direction and results. The consequence of error in carrying out these responsibilities may have a significant impact on delivery of the Maintenance Program throughout the State to the traveling public and movement of goods. Errors could result in a loss of credibility within the Department, with control agencies, local agencies and the public. Errors could additionally result in a loss of confidence in the Department's capability to carry out and meet its commitments, incur higher program and project costs, create delays in program and project completion, and cause lost funding opportunities and possible litigation. Judgment errors could result in multiple program impacts statewide. Consequences of error also includes the potential for setting inconsistent direction, erroneous measurement leading to poor resource decisions – all of which can seriously reduce program results and effectiveness of the statewide Maintenance Program.

PUBLIC AND INTERNAL CONTACTS

The incumbent works extensively with the Maintenance Program Assistant Division Chiefs, Office Chiefs and their staffs, management from multi-disciplinary Divisions, Districts and Maintenance Managers. The incumbent must communicate effectively with executive management in the Department on a frequent basis, specifically the Director's Office and District Management. External contacts may include: the Business Transportation and Housing Agency, Department of Finance, Legislative Analysts Office, public organizations, the Federal Highway Administration, other State Departments of Transportation, local agencies, and national organizations. May interact with other state, local and national agencies to identify best practices in operational and system performance evaluation for maintenance activities.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for long periods of time using a keyboard and video display terminal. The incumbent must be able to interact effectively with many people. It is important that the incumbent work with others in a cooperative manner. The incumbent must be able to deal effectively with pressure, maintain focus, and intensity yet remain optimistic and persistent, even under adversity. The incumbent must be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. The incumbent must behave in a fair and ethical manner toward others and demonstrate a sense of responsibility and commitment to public service. The incumbent must value cultural diversity and other individual differences in the workforce. Acts as liaison between the Maintenance Division Chief Assistant Division Chiefs, Office Chiefs and overhead programs on strategic planning matters. Has regular contact with District Maintenance management and key staff.

The incumbent must have the ability to multi-task, adept to changes in priorities, and complete tasks or projects with short notice. The incumbent must be able to concentrate in order to review and create documents and meet strict deadlines at times.

WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate.

The employee is required to sit for long periods of time using a keyboard and video display; maintain long periods of concentration when doing analysis and data checking, and respond to difficult situations when dealing with persons of diverse background, needs and situations.

This position requires occasional lifting of up to 25 pounds without assistance. Bending, stooping, and pulling may be required within normal course of performing some of the responsibilities associated with the position.

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)

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
