

DUTY STATEMENT

1. POSITION INFORMATION	
Civil Service Classification Information Technology Manager II	Working Title Chief, Financial and Contract Management
Employee Name Vacant	Position Number 791-730-1406-002
Project/Division Name CalHEERS Project	Supervisor's Name Lorna Eby
Unit Financial and Contract Management	Supervisor's Classification CEA C, Project Director
Physical Work Location 2329 Gateway Oaks Drive, Ste. 100, Sacramento 95833	Duties Based on: <input checked="" type="checkbox"/> Full Time <input type="checkbox"/> Part Time - Fraction Click here to enter text.
Effective Date TBD	
2. REQUIREMENTS OF POSITION	
<p>Check all that apply:</p> <p><input checked="" type="checkbox"/> Conflict of Interest Filing (Form 700) Required <input checked="" type="checkbox"/> Requires Fingerprinting & Background Check</p> <p><input checked="" type="checkbox"/> May be Required to Work in Multiple Locations <input checked="" type="checkbox"/> Other (<i>specify below in Description</i>)</p> <p>Description of Position Requirements (e.g., the position may move from project to project upon business need, managing staff at an alternate location, graveyard/swing shift, frequent travel, etc.):</p> <p><i>The statements contained in this job description reflect general details as necessary to describe the principal functions of this position. It should not be considered an all-inclusive listing of the work requirements. The incumbent of this position may perform other duties (commensurate with this classification) as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload. The incumbent must be flexible and adaptable to changing priorities and direction. Minimal local travel may be necessary.</i></p>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
<p>IT Domains used:</p> <p><input checked="" type="checkbox"/> Business Technology Management <input checked="" type="checkbox"/> Information Technology Project Management</p> <p><input type="checkbox"/> Client Services <input type="checkbox"/> Software Engineering</p> <p><input type="checkbox"/> Information Security Engineering <input type="checkbox"/> System Engineering</p>	
<p>Summary Statement (Briefly describe the position's organizational setting and major functions): Summary Statement (Briefly describe the position's organizational setting and major functions): Under administrative direction of the California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) Project Director, the Information Technology Manager II (ITM II) is an executive level team member responsible for managing and directing the Financial & Contract Management unit for a highly complex and large-scale interdepartmental IT project (valued at over 1 billion dollars), The CalHEERS Project supports the California Health Benefit Exchange programs administered by two sponsor departments, the Department of Health Care Services (DHCS) and Covered California. The ITM II is responsible for executive level management of multiple teams with the unit: Fiscal & Contract Management (Financial Management & Administration and Contracts & Deliverables Management), Quality Management, IV&V and the System Integrator Procurement Project and provides direction to two subordinate managers. The ITM II provides project management oversight of the full procurement lifecycle and requires the highest level of technical and communication skills to represent the Project. The ITM II is responsible for the delivery of all contract management activities for the System Integrator (SI) contract, all project level fiscal management activities, and oversees the procurement of project support contracts. The incumbent must be flexible and adaptable to changing priorities and direction and possess a high level of emotional maturity, diplomacy, tact, and possess multi-disciplinary management experience. Duties may include access to information systems containing protected enrollee information, including federal tax information, protected health information, and personally identifying information.</p>	

Percentage of Duties	Essential Functions
30%	Direct the oversight of all financial management and contract management activities related to the CalHEERS Project and the activities to develop, implement, operate, and successfully maintain and execute the totality of these activities. Oversee quality assurance and fiscal activities in support of these efforts. Resolve contract management and financial management issues of the highest complexity in partnership with Project and Sponsor leadership and Legal teams. Manage risks and issues related to the CalHEERS procurement, fiscal and contract management activities, including monitoring project risks and quality measures, developing and maintaining mitigation plans, monitors execution of mitigation plans, and developing and maintaining contingency plans. Engage with and demonstrate an understanding of the role of IV&V on the project. Advise the Project Director and Deputy Project Director on contract management, fiscal and procurement issues and risks related to the CalHEERS Project.
20%	Manage and direct procurement activities consistent with project management best practices for the SI contract to maintain and operate CalHEERS. This includes the full procurement lifecycle as needed, including development and maintenance of contract requirements and proposal evaluation criteria, responses to bidder questions about the RFP, and subsequent RFP addenda. This requires the management and coordination of input and feedback from stakeholder work groups, advisory groups, and the CalHEERS Sponsor departments. Manages and directs all negotiation activities for new contracts or as related to amendments. Serve on the CalHEERS Evaluation Team for draft and final bids to ensure contracts and amendments meet the Sponsor departments' long-term needs. Manage the overall efforts and work with executives from DHCS, Covered California, Office of Systems Integration (OSI), Statewide Automated Welfare System (SAWS), County Welfare Directors Association (CWDA) and others to ensure that the system meets the needs of participating partners, and is delivered on time and within budget. Direct and monitor project management activities to include communication, issue and risk management, and scheduling.
20%	Manage stakeholder relationships and engagement as they relate to financial, budget contract management and procurement activities. Participate in identification of stakeholders and ensure consistent communication and coordination with all stakeholders. Coordinate with the counties, DHCS program managers, Covered California program managers, OTSI and the SI to obtain county and state participation in activities to ensure success. Oversee preparation of Project approval documents to be approved by sponsor departments. Oversee the preparation and approval of budget documents to include the annual Budget Change Proposals and Federal approval documents. May provide budget and contract related testimony to control agencies and legislature, as needed. May be required to travel to attend various work-related activities including but not limited to: meetings, trainings, and conferences.
20%	Provide leadership to employees directly and indirectly reporting to this position. Establish program priorities and objectives, ensure appropriate staffing within the Contract & Procurement Management Unit, promote professional development and succession planning, respond to staff concerns, and address performance issues. Hire, evaluate, train, motivate, discipline, and otherwise manage employees. Promote the department's Equal Employment Opportunity program, American's with Disabilities Act, and other personnel practices and policies to maintain standards that promote a work environment free from discrimination, harassment, retaliation, and unprofessional or disrespectful conducts using knowledge of policies and procedures and communication skills on an on-going basis.
10%	Participate in and represent CalHEERS at an executive level in all aspects of the project governance process on issues related to the Project, contract management, financial management and procurement. Participate in establishing enterprise policies and procedures to ensure best practices are consistently exercised across the organization. Provide input into Section/Unit development and represent CalHEERS in meetings with stakeholders as appropriate. Establish and maintain ongoing contacts with all levels of management, external control agencies, customers, vendors, businesses, contractors, and State and federal entities.
Percentage of Duties	Marginal Functions
5%	Perform other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply from the drop-down menus)*

Standing: Infrequent (7-12%)	Sitting: Frequent (51-75%)
Walking: Occasional (13-25%)	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Not Applicable
Lifting: Not Applicable	Bending/Stooping: Not Applicable
Other: Click here to enter text.	
Type of Environment: a. N/A b. N/A	
Interaction with Public: a. Select b. Select c. Select.	

5. SUPERVISION

Supervision Exercised (e.g., Directly – 1 Information Technology Supervisor II; Indirectly – 5 Information Technology Associates)

Directly - 2 Information Technology Manager I; contractors

Indirectly - 5 Information Technology Specialist I; 1 Staff Services Manager II; 1 Staff Services Manger II (Retired Annuitant); 1 Staff Services Manager I (Specialist); 2 Associate Governmental Program Analyst; contractors

6. SIGNATURES

Employee's Statement:

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Duty Statement and can perform the duties outlined above without a Reasonable Accommodation.

Employee's Name (Print)

Employee's Signature

Date

Supervisor's Statement:

I have reviewed the duties and responsibilities of this position and have provided a copy of the Duty Statement to the Employee.

Supervisor's Name (Print)

Supervisor's Signature

Date

7. HRD USE ONLY

Human Resources Division Approval

Duties meet class specification and allocation guidelines.

Exceptional allocation, 625 on file.

HR Analyst initials

Date approved

CR

6/27/2024

Reasonable Accommodation Unit use ONLY (completed after appointment, if needed)

* If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation form and submit to Human Resource Division (HRD), Reasonable Accommodation Coordinator.

List any Reasonable Accommodations Made:

[Click here to enter text.](#)

** AFTER SIGNATURES ARE OBTAINED:

- SEND THE ORIGINAL DUTY STATEMENT TO HRD TO FILE IN THE EMPLOYEE'S OFFICIAL PERSONNEL FILE (OPF)
- PROVIDE A COPY TO THE EMPLOYEE
- FILE A COPY IN THE SUPERVISOR'S DROP FILE