

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Information Technology Specialist II	OFFICE/BRANCH/SECTION Project and Portfolio Management Section	
WORKING TITLE Senior IT Business Analyst	POSITION NUMBER 900-170-1414-xxx	REVISION DATE 08/01/2022

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 Information Technology Manager I, Project and Portfolio Management Section, the incumbent is a member of the IT Project Management team primarily responsible for conducting business analysis and procurement work on IT projects. The incumbent performs all functions related to the preparation, reviewing, processing, tracking, and reporting on IT Project procurements including the development of IT Statement of Work language for procurement packages. The incumbent will also conduct IT business analysis for projects including all functions related to requirements management, alternatives analysis, market research, cost benefit analysis, and development financial analysis worksheets.

The incumbent's responsibility will entail performing the analytical work of formulating business cases, feasibility studies and research analysis reports related to technology endeavors. The incumbent will coordinate and consult with users, administrators, and engineers to identify business and technical requirements for proposed system modifications or technology requirements. Identify service areas or systems that need improvement and collaborate with IT project team members to deliver recommendations. Assess organizational readiness for IT projects and serve as a change agent to ensure the solution is accepted by stakeholders. Apply IT Business Analysis industry standards, principles, methods, and techniques through all phases of the Project Management and System Development Life Cycles. Validate requirements and ensure they are complete and perform requirements traceability throughout the project life cycle. At project conclusion, the incumbent will contribute to lessons learned at post-project evaluation. The incumbent will also Facilitate the D20 procurement process for the complex IT acquisitions by developing solicitation documents and bid specifications for both competitive and non-competitive transactions. Develop solicitation documents based on feedback gathered through IT project meetings. Develop and/or review proposed Scope of Work of complex IT service contract requests including hardware, software and maintenance, and IT consulting services to ensure they adequately describe the work to be done.

DOMAIN(s):

Business Technology Management
IT Project Management

CORE COMPETENCIES:

As an Information Technology Specialist II, 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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **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. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement)

ADA Notice

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- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Innovation)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Integrity, Pride)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
40% E	Within the scope of an IT project, the Senior IT Business Analyst performs the analytical work of formulating business cases, feasibility studies and research analysis reports related to technology endeavors. Coordinate and consult with users, administrators, and engineers to identify business and technical requirements for proposed system modifications or technology requirements. Identify service areas or systems that need improvement and collaborate with IT project team members to deliver recommendations. Assess organizational readiness for IT projects and serve as a change agent to ensure the solution is accepted by stakeholders. Apply IT Business Analysis industry standards, principles, methods, and techniques through all phases of the Project Management and System Development Life Cycles. Validate requirements and ensure they are complete and perform requirements traceability throughout the project life cycle. At project conclusion, the incumbent will contribute to lessons learned at post-project evaluation.
40% E	Facilitates the procurement process for the complex IT acquisitions by developing solicitation documents and bid specifications for both competitive and non-competitive transactions in accordance with State and Federal laws relating to procurement and contracting activities. Conduct meetings with stakeholders to resolve ambiguities and/or issues with the development of solicitations. Develop solicitation documents based on feedback gathered through IT project meetings. Develop and/or review proposed Scope of Work of complex IT service contract requests including Hardware, software and maintenance, and IT consulting services to ensure they adequately describe the work to be done. Work with requesters to ensure Scope of Work complies with the California Department of Technology, State Information Management Manual, State Administrative Manual, Public Contract Code, State Contract Manual and DGS/DPAC protocols, practices and regulations to ensure compliance with Department, State, and Federal policies and mandates.
15% E	Provide regular status reports to management on all assignments, including projects and project procurements. Support management requests regarding IT project details by working with IT project managers. Participate in IT project status meetings. The incumbent establishes procedures and performance standards for processing contract requests. Works with the IT/Program Resource Manager(s) and DPAC to develop internal and external reports on IT contracting activity. Reviews Advantage contract reports to request the movement of encumbrances or to disencumber resources.
5% M	Train, mentor, or lead other Business Analyst staff in the use of State and industry best practices including the Business Analyst Body of Knowledge (BABOK), the California Project Management Framework (CA-PMF) toolset, the IT PMO toolsets, SharePoint, and scheduling tools.

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

The incumbent has no direct supervisory responsibilities. However, this position may require the incumbent to lead teams and provide direction to IT Specialist I Project Managers to achieve common goals and objectives.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

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The incumbent is required to have a broad knowledge of principles of the process for initiating, planning and executing IT projects, with a focus on project management and working with business analysts, IT subject matter experts and business program leads and sponsors to implement IT solutions. The incumbent must exercise a high degree of initiative, independence, and demonstrate tact and good judgment. The incumbent must be able to communicate effectively in order to develop and maintain effective and cooperative working relationships. The incumbent must have strong written and verbal skills to communicate issues and concerns. The incumbent must be able to adapt easily to changing priorities and maintain consistent attendance in the performance of these specific functions. The incumbent must possess a high degree of technical expertise to be operationally competent in a highly complex and sensitive function, developing and/or recommending processes, procedures, and methodologies for the approval of Department Management and will work closely with both internal and external staff at all levels.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Bad judgment and/or decisions may prevent the incumbent from effectively supporting the Department's IT projects. This may contribute to the cancellation of projects, schedule delays, cost overruns, technical issues, and products that do not fulfill all of a customer's requirements and expectations. Should this occur, the Department may lose credibility relative to its ability to track and manage its IT projects. This may lead to a further loss of funding for other current and future IT projects, along with an increase in schedule delays and project overhead costs due to increased Control Agency reporting, technical, financial, and project management requirements.

PUBLIC AND INTERNAL CONTACTS

The incumbent will be called upon to interface closely with program, technical and IT staff and management within the Department. In performing the responsibilities of this position, the incumbent may initiate contacts with other departments, have contact with Government and/or Control Agencies such as the Department of General Services or the Department of Technology Services; vendors of commercial tools that may be adopted by the Department; or outside consultants concerning successful project delivery.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical Requirements - The incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone.

Mental Requirements - Be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Employee must have the ability to multi-task, to adapt to changes in priorities, and complete tasks or projects with short notice.

Emotional Requirements - Be able to value cultural diversity and other individual differences in the workforce; adjust rapidly to new situations warranting attention and resolution; consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations; be tactful and treat others with respect.

WORK ENVIRONMENT

The incumbent will perform work indoors in a climate-controlled environment under artificial lighting or teleworking. The incumbent may be required to work for extended periods of time in a computer room that maintains an approximate temperature of 70 degrees. Working hours may vary between 6:00am and 6:30pm. If the incumbent has a Class C driver's license and utilizes their own personal vehicle, they may be reimbursed for travel expenses. When available, a State vehicle will be provided. Infrequent out-of-town travel may be required to assist with desktop support activities in local Caltrans facilities.

Some weekend or after hours work may be required.

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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.)

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