

DUTY STATEMENT

TECH 052 (REV. 02/2018)

RPA NUMBER (HR USE ONLY)

23-305 PROPOSED

ALERT: This form is mandatory for all Requests for Personnel Action (RPA).

INSTRUCTIONS: Before completing this form, read the instructions located on last page.

Section A: Position Profile

A. DATE 4/17/2024	B. APPOINTMENT EFFECTIVE DATE	C. INCUMBENT NAME
D. CIVIL SERVICE CLASSIFICATION Information Technology Manager I		E. POSITION WORKING TITLE Account Director
F. CURRENT POSITION NUMBER 695-340-1405-002		G. PROPOSED POSITION NUMBER (Last three (3) digits assigned by HR)
H. OFFICE / SECTION / UNIT / PHYSICAL LOCATION OF POSITION Customer Engagement Services / Rancho Cordova		I. SUPERVISOR NAME AND CLASSIFICATION Jason Fanner, Information Technology Manager II
J. WORK DAYS / WORK HOURS / WORK SHIFT (DAY, SWING, GRAVE) MONDAY-FRIDAY 8:00 AM-5:00 PM		K. POSITION REQUIRES: FINGERPRINT BACKGROUND CHECK <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO DRIVING AN AUTOMOBILE <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO

Section B: Position Functions and Duties

Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).

	<p>Information Technology Domains (Select all domains applicable to the incumbent's duties/tasks.)</p> <p><input checked="" type="checkbox"/> Business Technology Management <input checked="" type="checkbox"/> IT Project Management <input checked="" type="checkbox"/> Client Services <input type="checkbox"/> Information Security Engineering <input type="checkbox"/> Software Engineering <input type="checkbox"/> System Engineering</p>
	<p>Organizational Setting and Major Functions</p> <p>Under general direction of the Customer Engagement Services (CES) Information Technology Manager II (IT Mgr II), the Information Technology Manager I (IT Mgr I) acts as an Account Director (AD) responsible for managing the California Department of Technology (CDT) relationship with one or more Tier I accounts (the largest and/or most complex customer departments). In addition to managing the relationship with their suite of accounts, the IT Mgr I (AD) develops strategic partnerships, manages service issues, and develops and manages effective communication plans.</p> <p>The IT Mgr I (AD) possesses a mastery level of Information Technology (IT) knowledge and marketing skills and works toward ensuring monolithic/silo applications are not perpetuated in future development processes. The IT Mgr I (AD) manages the customer experience with CDT ensuring that the customer's request for services are defined and met in a timely manner. The IT Mgr I (AD) works directly with their suite of accounts' CIOs, directorates, high-level IT and business managers, and system/application technologists to advocate technology solutions for current and future IT needs in alignment with the State Strategic Plan. The IT Mgr I (AD) must have a thorough understanding of their assigned suite of accounts' business needs and related IT requirements; CDT services; principles of organizational development; performance measurement methods; the Information Technology Information Library (ITIL) framework, Service Management and associated best practices; knowledge of statewide protocols and procedures; and governmental Request For Proposal, budget and project approval processes. Additionally, the IT Mgr I (AD) possesses a complete understanding of the State IT Strategic Plan and CDT shared services that lead to increased efficiencies and savings for customer departments.</p>
<p>% of time performing duties</p> <p>25%</p>	<p>Essential Functions (Percentages shall be in increments of 5, and should be no less than 5%.)</p> <p><u>Strategic Planning and Marketing:</u></p> <ul style="list-style-type: none"> Actively promote, market, and negotiate CDT shared services, which leads to increased efficiencies and savings for the state. Participate (as allowed by the customers) in customers' Strategic Planning for IT, focusing on alignment with the statewide IT Strategic Plan and best practices. Assist with planning, development, design, and implementation of technical solutions essential to the accounts' missions and ensure the monolithic/silo applications are no longer perpetuated in future system development. Communicate the strategic plans of their suite of accounts to CDT management so they are reflected in CDT Strategic and Tactical plans. Provide leadership and direction to all accounts to assist in converting processes designated in silo environments to shared services.

- Provide CDT and Statewide IT policy guidance, clarification, and technical assistance in the planning, transitioning, and implementation of solutions required to meet current and future IT needs of each account.
- Facilitate collaboration between CDT service units and the customer to identify requirements and develop cost-effective solutions.
- Implement the CES Business Plans (strategic, operational, and risk) and performance tracking.
- Participate in the development and implementation of the CES Business Plan.
- Provide input on developing the CES budget.

15%

Operational Planning and Management:

- Develop and maintain account profiles including: detailed information on customer applications and criticality, services used, future projects, and processes, and use the account profiles to improve service quality by better understanding customers and their business needs.
- Develop and manage the account library and processes.
- Collaborate with CDT staff on process and service improvement.
- Establish and model standard practices and procedures for the Account Management teams.
- Conduct periodic audits of the account library to assure the content is maintained by the CDT service areas.
- Establish and model tool use by CES teams, including devices (e.g., laptops), media (e.g., Instant Messaging, SharePoint), and applications (e.g., the Service Catalog, ServiceNow and Customer Relationship Management).
- Oversee management of account profile processes.
- Oversee management of customer escalation processes.
- Oversee communication of processes, standards and procedures to customers.

15%

Service Management and Issue Resolution:

- Consult with executive management and provide coordination of subject matter experts on a wide range of shared services issues.
- Provide technical coordination in negotiating IT vendor contracts in association with CDT to ensure the client receives best value.
- Actively identify potential new CDT services to meet customer needs, and participate in planning for service decommission.
- Proactively identify and resolve the most complex technological issues.
- Manage service escalations as necessary if service areas are not meeting service level objectives.
- Participate in service improvement projects.
- Use repeatable processes for managing tasks and projects.
- Develop, implement, and advocate the use of customer service escalation processes.
- Negotiate, coordinate, and oversee account service levels and associated deliverables.
- Develop Memos of Understanding, Statements of Work, and other documents.
- Oversee management of customer requests and incidents to resolution.
- Oversee management of customer application assessments.

15%

Communication:

- Implement and manage communication plans, and track compliance.
- Manage communications to customers; provide a consistent, unified message regarding CDT policies, events, and services from all CES staff.
- Manage individual communication plans for Tier I customers.
- Represent CDT/CES at various customer and Statewide IT events.

15%

Leadership and Mentoring:

- Take a lead role and/or actively participate in CES workgroups that facilitate the development of policies and procedures for communications, standardization of processes, and the implementation of training and mentorship practices for CES staff.
- Present yourself to CDT service areas as the strategic partner and advocate for assigned customers by taking initiative on the customers' behalf as needed to solve problems, implement solutions, and assist with escalations.

10%

Analysis:

- Gather and analyze revenue potential from suite of customers for use in CDT strategic planning.
- Oversee analysis of incidents, work orders and service requests, determination of trends, and recommendations for service improvements based on the results.
- Oversee analysis of customer service usage, and development of proposals for improvements or cost-saving measures.
- Develop and use repeatable processes.

5%

Marginal Functions (Percentages shall be in increments of 5, and should be no more than 5%.)

- As needed, act as backup supervisor for team staff.
- Other related duties as required.

Work Environment Requirements

Job duties require the IT Mgr I's (ADs) be either on the customer or CDT site during normal business hours. The IT Mgr I (AD) may work at their account locations up to 40% of the time but are required to be on-site at CDT on specific work days and/or specific events. In coordination with other IT Mgr I's (ADs), assure lead coverage during normal business hours. IT Mgr I's (ADs) carry a mobile device during working hours and off-shift for special assignments, and work evenings and weekends as required to complete assignments. IT Mgr I's (ADs) should expect periodic rotations to other accounts.

Allocation Factors (Complete each of the following factors.)

Supervision Received:

The IT Mgr I (AD) receives general direction from the CES IT Mgr II. The IT Mgr I (AD) operates independently on the most complex Account Management issues and manages the CDT relationship with their suite of assigned accounts.

Actions and Consequences:

Decisions and recommendations made by the IT Mgr I (AD) have serious and significant economic impact to customer programs and IT systems. The consequence of poor decisions, judgements, or advice may have a negative or serious impact on the reputation of CDT and customer confidence in the services provided by CDT, as well as a negative impact on the budgets of customers and CDT.

Personal Contacts:

IT Mgr I's (ADs) work on a daily basis with CDT and customer executive staff as well as a variety of high-level technical, administrative, and managerial staff. IT Mgr I's (ADs) collaborate with technical staff, and represent CDT to a wide variety of customers, vendors, contractors, and other State staff in a range of professional situations.

Administrative and Supervisory Responsibilities (Indicate "None" if this is a non-supervisory position.)

IT Mgr I's (ADs) collaborate with other CES staff on business planning, tracking, and measurement, including budget and cost control issues.

Supervision Exercised:

IT Mgr I's (ADs) are non-supervisory, but may provide backup supervision of the CES staff as needed.

Other Information

Desirable Qualifications: (List in order of importance.)

- Possess technical expertise on a wide range of IT subjects, a thorough understanding of industry trends, and CDT services.
- Expert in the State's budgeting process, legislative and administrative procedures, procurement documents and procedures, licensing issues, and the roles and responsibilities of oversight and regulatory agencies.
- Perform at a mastery level in communication and presentation skills.

- Possess the ability to develop positive working relationships with, and provide leadership to, all levels of State staff and external stakeholders.
- Expert in requirements analysis principles, cost-benefit principles and methods, and risk management techniques.
- Possess excellent customer service skills.
- Expert in defining business and technical requirements, evaluating plans and outcomes, and leading the development of IT documents, such as project approval documents, RFPs, and Budget Change Proposals (BCPs).
- Understand the direction of industry trends, CDT services, and how emerging technologies might enhance CDT's ability to meet future client needs.
- Possess the ability to develop strategic alliances with the customers in order to understand the IT services needed to meet the customer business needs and identify service opportunities.
- Use technology and repeatable processes to achieve the highest level of productivity.
- Model and advocate tool use to all CDT staff.

INCUMBENT STATEMENT: I have discussed the duties of this position with my supervisor and have received a copy of the duty statement.

INCUMBENT NAME (PRINT)	INCUMBENT SIGNATURE	DATE
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SUPERVISOR STATEMENT: I have discussed the duties of this position with the incumbent.

SUPERVISOR NAME (PRINT)	SUPERVISOR SIGNATURE	DATE
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Instructions

Copies and Distribution	<ul style="list-style-type: none"> • <u>Current and Proposed Duty Statements</u>: Submit with Request for Personnel Action (RPA) package. • <u>Approved Duty Statement</u>: Supervisor reviews with incumbent; both supervisor and incumbent must sign and date. • <u>Signed Copies</u>: Original to supervisor; copy to incumbent; scanned/electronic version emailed to Human Resources. 		
Section A: Position Profile	Complete Sections A through K. If position number is changing, complete sections D, E, G, and H using the proposed position information. If incumbent's name is known, complete section C.		
Section B: Position Functions & Duties	Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).		
Information Technology Domains	Select all domains applicable to the incumbent's duties/tasks.		
Organizational Setting and Major Functions	Provide a <u>brief</u> description of the position's reporting relationship, primary role, and purpose.		
Essential Functions	Identify the fundamental job duties of the position that must be performed, with or without reasonable accommodation. NOTE: Essential Functions shall be properly aligned with the classification specification. Percentages shall be in increments of 5, and should be no less than 5%. The total percentage of all functions (essential and marginal) must equal 100%. Per Government Code section 12926.1 (a-c), a job function or task may be considered an essential function for several reasons, including, but not limited to: <ul style="list-style-type: none"> • The position exists to perform the function. • There are a limited number of other employees available to perform the function, or among whom the function can be distributed. • The function is highly specialized; the person is hired for special expertise or ability to perform the function. • Removal of the function would fundamentally alter the job. To write essential functions for the position: <ul style="list-style-type: none"> • Identify the major functions of the job. Most positions have five to seven major functions. • Identify the specific tasks associated with each major function (include end products). • Identify the level of work and why the work is done. The below is an example of how to write an essential function and the associated task statements: ESSENTIAL FUNCTIONS <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; padding: 5px;">45%</td> <td style="padding: 5px;"> Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> <ul style="list-style-type: none"> • Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. • Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. • Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda]. </td> </tr> </table>	45%	Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> <ul style="list-style-type: none"> • Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. • Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. • Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda].
45%	Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> <ul style="list-style-type: none"> • Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. • Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. • Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda]. 		
Marginal Functions	Identify functions or tasks that are performed, but are not fundamental duties of the position. These are functions or duties that can be assigned to another employee and can be characterized as non-essential or marginal. The phrases "perform other related duties" or "perform other related work" can be used in the marginal functions field. NOTE: Percentages shall be in increments of 5, and should be no more than 5%. The total percentage of all functions (essential and marginal) must equal 100%.		
Work Environment Requirements	Identify physical or mental requirements, work conditions, hazards, and equipment used on the job and required to perform the essential functions of the job. NOTE: Specify in this section if a fingerprint background check is required.		
Allocation Factors	<ul style="list-style-type: none"> • <u>Supervision Received</u>: Identify the scope of initial instruction, how work is supervised while in progress, and nature and purpose of final review. • <u>Actions and Consequences</u>: Identify in what areas judgment, decisions, and recommendations are made, and probable effects of poor decisions or recommendations. • <u>Personal Contacts</u>: Identify with whom, how frequently, and for what purpose personal contacts are required with persons outside of the immediate work group. • <u>Administrative and Supervisory Responsibilities</u>: Briefly identify the extent of participation in management functions (e.g., planning, budgeting, cost control, reporting, selecting, placement, and development of personnel). Indicate "None" if a non-supervisory position. • <u>Supervision Exercised</u>: Identify the type of supervisory responsibility exercised and indicate whether supervision is a responsibility of the position or of a lead nature. 		
Other Information	Identify any significant factors or special requirements for this position that are not included elsewhere on this form. <ul style="list-style-type: none"> • <u>Desirable Qualifications</u>: Identify any special personal characteristics, interpersonal skills, additional qualifications, specific business needs, and additional attributes that will enhance the incumbent's ability to perform a particular function. (e.g., professional certification or license, general or specialized knowledge in the field, ability to qualify for a fidelity bond, aptitude for investigative work, skills and abilities above the required minimums.) NOTE: Please list the desirable qualifications in order of importance, as they will be listed on the Job Opportunity Bulletin (JOB). 		