EDD **Employment Development Department**
State of California

☐ Current
☒ Proposed

POSITION STATEMENT

1. POSITION INFORMATION

CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Information Technology Specialist I	Project Portfolio Management Analyst
NAME OF INCUMBENT:	POSITION NUMBER:
VACANT	280-343-1402-976
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Enterprise Strategies and Project Management Office / Portfolio Management and Oversight Group	Vacant
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Technology Governance Division	IT Manager I
BRANCH:	REVISION DATE:
Information Technology Branch (ITB)	11/11/2023

Duties Based on: ☒ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours

2. REQUIREMENTS OF POSITION

Check all that apply:

☒ Conflict of Interest Filing (Form 700) Required   ☐ Call Center/Counter Environment
☐ May be Required to Work in Multiple Locations   ☒ Requires Fingerprinting & Background Check
☐ Requires DMV Pull Notice   ☐ Bilingual Fluency *(specify below in Description)*
☐ Travel May be Required   ☐ Other *(specify below in Description)*

Description of Position Requirements:
(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:
(Briefly describe the position's organizational setting and major functions)

Information Technology Domains (Select all domains applicable to the incumbent's duties/tasks.)

☒ Business Technology Management   ☒ IT Project Management   ☒ Client Services
☐ Information Security Engineering ☐ Software Engineering   ☐ System Engineering

Under direction from the IT Manager I over the Portfolio Management and Oversight Group, performs a variety of advanced activities to support the department's IT Project Portfolio Management (PPM) activities. In a mentoring capacity, provides guidance for the development of project lower-level IT Specialist's workplans, to create processes and procedures to implement Project Portfolio Management oversight monitoring and reporting activities pertaining to all IT projects.

Assists the department in refining and improving on mission critical activities such as:; create project portfolio management frameworks and roadmaps to better align project goals with business strategy; improve data-

driven decision making, project prioritization and selection; and optimize resource utilization across the enterprise. This position will provide mentoring to the Project Portfolio Management Associate who will assist in the development of a departmentwide Portfolio Management Oversight Database and other PPM program assignments. Collaborates with key department stakeholders to identify and design reporting requirements for the collection of critical metrics, data and information. Applies best practices such as the Project Management Institutes (PMI's) philosophy to use Project Portfolio Management (PPM) to increase business value by aligning projects with an organization's strategic direction, PMI'sproject portfolio management vision to use Project Portfolio Management (PPM) to maximize business value by aligning projects with an organization's strategic direction, making the best use of limited resources, and building synergies between projects.

Incumbent is also available, as needed, to serve as a Project Manager for complex IT Project Manager assignments; to provide Technology Governance Division senior management an option to optimize in-house talent. A key benefit will be capitalizing on this incumbent's wealth of Project Portfolio Management (PPM) and IT Project Management (PM) expertise. Specifically, to seamlessly integrate PPM and PM techniques to drive project deliverables with an optimal incorporation of best practices from both of these disciplines.

Percentage of Duties	Essential Functions
35%	Plan and develop requirements for a PPM Database to house meaningful Enterprise Architecture (EA) Portfolio Management information to aid in management decision about current and prospective IT projects to be considered for inclusion in the department's EA Portfolio. Key PPM Database design and development considerations include: • Enable planned and ad hoc data extraction features. For example, key data and information to demonstrate the department's compliance with state IT Control Agency requirements such as the California Department of Technology's requirements regarding: 1.) software development lifecycle (SDLC) requirements; 2.) CDT's CA-PAL (California Project Approval Lifecycle), and 3.) CA-PMF (California Project Management Framework) policy requirements • Provide meaningful management information Roadmap to assist the department in making efficient and effective decisions that control or influence the direction of the EA IT projects and their success for achieving strategic PPM outcomes • Document User processes and procedures to enable cataloging and memorialization of valuable information to be derived from this PPM Database and be easily accessible by Departmentwide IT Stakeholders • Ensure the availability of data and information regarding the performance of IT projects in the EA PPM to demonstrate the department's conformance with the state's IT control Agencies' policy requirements, IT policies, guidelines, and best practices such as: CDT's CA-PAL (California Project Approval Lifecycle), CA-PMF (California Project Management Framework) policy requirements, Department of Finance (DOF) Financial Analysis Worksheet (FAW), DOF Planning and Expenditure Report DF 576, Budget Change Proposal (BCP), BCP Expenditure Plan, BCP Quarterly Expenditure Reports, and Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK) • Establish processes for the ongoing maintenance and updating of this mission critical PPM tool
35%	In addition, when serving as a Project Manager, integrates data and information processes and functions that will seamlessly support the above critical Project Portfolio Management IT Control Requirements to efficiently demonstrate compliance with IT Control Agencies' reporting requirements.

	Applies best practices, such as the Project Management Institutes (PMI's) project portfolio management philosophy, to develop critical PPM processes such as: • Establishment of, and maintenance of a departmental Project Portfolio Management Oversight group, e.g., draft charter, draft strategic goals and objectives for this Oversight Group, tentative meeting schedule, draft meeting protocols such as Agenda development, recording meeting minutes requirements, etc. • Development of Disaster Recovery plans to safeguard and ensure uninterrupted availability of the PPM Database to ensure its functionality is continuously available • Collaboration with IT Project Management staff to gain insights into their plans to implement a new Hybrid Agile Project Management Framework (HAF). HAF is being developed to enhance the department's IT project management framework to meet changing customer needs and expectations. Agile methods can help teams manage work more efficiently and do the work more effectively while delivering the highest quality product within budget constraints. Also, when serving as a Project Manager, ensures Project Management plans include PPM tools for project portfolio monitoring functionality.
Percentage of Duties	**Marginal Functions**
15% 10%	Attends and participates in regular meetings with departmental PPM Stakeholders such as ITB architects, ITB IT Project Managers, and line program staff for whom IT services are being developed. Actively participates with these colleagues in discussions about actions that could affect changes and modifications to the department's Enterprise Architecture (EA) PPM.Provides mentoring guidance to the Project Portfolio Management Associate for their assignments to accurately interpret and apply the California Department of Technology's (CDT's) applicable Statewide Information Management Manual (SIMM) sections. This includes assisting the Project Portfolio Management Associate to continuously keep abreast of current and new requirements related to PPM to maintain an effective working knowledge to accurately interpret and apply them.
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

Standing: Occasionally - activity occurs < 33%	Sitting: Frequently - activity occurs 33% to 66%
Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Occasionally - activity occurs < 33%
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%

Other: *Click here to enter text.*

Type of Environment:

☐ High Rise   ☒ Cubicle   ☐ Warehouse   ☐ Outdoors   ☐ Other**:**

Interaction with Customers:

☐ Required to work in the lobby ☐ Required to work at a public counter
☐ Required to assist customers on the phone ☐ Required to assist customers in person
☐ Other:

5. SUPERVISION EXERCISED:

(List total per each classification of staff)
Click here to enter text.

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 Position Statement.

Employee's Name:	
Employee's Signature:	Date:

Supervisor's Statement:
I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.

Supervisor's Name:	
Supervisor's Signature:	Date:

7. HRSD USE ONLY

Personnel Management Group (PMG) Approval

	PMG Analyst Initials	Date Approved
☒ Duties meet class specification and allocation guidelines.	JMB	5/2/2024
☐ Exceptional allocation, STD-625 on file.		

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

If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation (DE 8421) form and submit to Human Resource Services Division (HRSD), Reasonable Accommodation Coordinator.

List any Reasonable Accommodations made:

Supervisor: After signatures are obtained, make 2 copies:

- Send a copy to HRSD (via your Attendance Clerk) to file in the employee's Official Personnel File (OPF)
- Provide a copy to the employee
- File original in the supervisor's drop file