

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Information Technology Specialist III	OFFICE/BRANCH/SECTION D20/IT	
WORKING TITLE IT Strategic Portfolio Manager	POSITION NUMBER 900-170-1415-005	REVISION DATE 05/24/2024

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 administrative direction of the Project and Business Management Division (PBMD) Chief, the incumbent serves as the Information Technology (IT) Strategic Portfolio Manager. The incumbent will navigate and lead change in an innovative environment, collaborate cross-functionally to align technology solutions with strategic objectives. The incumbent is a horizontal role demonstrating strategic technical leadership, influence, and expertise to support and deliver best practice solutions to Caltrans. The incumbent is an expert level advisor and is a critical part of the extended IT Leadership team, participating in strategy development, implementing the department's IT strategic plan, overseeing the IT strategic actions, executive strategic initiatives and managing IT special projects.

Domain: IT Project Management, Business Technology Management

CORE COMPETENCIES:

As an Information Technology Specialist III, 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. (Cultivate Excellence - Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Engagement)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Cultivate Excellence - Engagement)
- **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)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Cultivate Excellence - Pride)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence - Innovation)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence - Innovation)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Cultivate Excellence - Innovation)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

45%	E	Serves as the PBMD Chief's strategic advisor. Plans, directs, organizes, and control all work activities for special projects as assigned. Provides strategic direction and guidance for the Caltrans IT Governance Program. Lead the development and/or update of the IT Strategic Plan. Performs the full range of project management activities including but not limited to procurement management, scope management, schedule management, quality management, risk management, and communications management. Provides oversight to all aspects of projects and ensuring all services and products are delivered as committed to, and customer need are met. Documents project scope, schedule, budget, and required resources. Manages all project deliverables on time and within budget. Evaluates the effectiveness of projects through the development and monitoring of performance measurements. Monitors compliance with established plans, schedules, and directives. Ensure cost- effective use of project resources. Assists the PBMD Chief, project sponsors and management in the preparation of recommendations, presentations, and decision-making analysis.
35%	E	Facilitates, manages, tracks, monitors and controls the Portfolios of Portfolio to implement the IT Strategic Plan. Assist the PBMD Chief in directing the establishment of polices and processes. Develops and implements procedures and standards to operationalize the Strategic Actions and maintain the portfolio of information. Ensures the ability to tangibly measure results of technology efforts. Works with leadership to ensure operational plans are aligned with the IT Strategic Plan and Caltran's overall strategic objectives and goals. Assists management in complying with complex control agency mandates. Consults and coordinates with customer, project staff and other technical experts to provide complex IT consulting and advisory services. This includes but is not limited to, developing Project Data Sheets, developing IT procurements/solicitations including developing complex and technical statements of work, performing legislative analysis, developing, implementing, and maintaining IT policies, standards, and guidelines.
15%	E	Formulates and recommends governance policies, practices and procedures. Implements and enforces IT Governance. Performs governance reviews. Conducts technology operational performance analysis and reports findings. Reviews budget change proposals and other IT-related project proposals and provide analysis to IT Executives. Reviews and provides recommendations to PBMD Chief on enterprise wide technology related policies and procedures.
5%	M	Performs other related duties in the specified domain(s) as needed.

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 acts as a team lead directing the most critical/ complex projects. Incumbent must possess ability to direct or coordinate duties and responsibilities to project personnel; negotiate for resources with project stakeholders or suppliers; perform vendor performance and contract management as related to information technology and project management.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must possess knowledge of the organization and functions of California State Government including the organization, principles, practices, and policies; the ability to balance concurrent assignments and complete assignments on time and at a level commensurate with the position classification; the ability to plan, organize, and lead the work of multi-disciplinary professionals; the ability to analyze and formulate IT policies, organizations, procedures, and practices; and knowledge of the management of large and complex technology projects and project portfolios. Leadership skills necessary to serve as project director or portfolio and/or project manager of large, complex technology project efforts. Ability to interface with business, technical, and policy-administrators personnel and management. Ability to plan, organize, and to provide oversight and leadership to the work of multi-disciplinary professional staff. Must possess a high level of project management expertise and a background in the development of technology policies, procedures, and programs. Must have extensive experience with and in-depth knowledge of best-practice project management methodologies, standards, and practices, as well as experience in information technology concepts, practices, methods, and principles. Knowledge of information technology governance processes and procedures; procurement; contract negotiations; vendor management; and customer relationships management. Ability to quickly and accurately understand the business needs, programs, and goals of the Department associated with assigned areas of responsibility. Strong communication, leadership, interpersonal, and problem solving skills.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for extensive knowledge of IT policy, standards, processes and procedures, and working with customers and IT colleagues to identify business problems, opportunities and solutions to advance business programs. The incumbent must exercise good judgment, analyze problems, and take appropriate action. Bad judgment and/or decisions will

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

have a negative impact on the Department's ability to process critical decision-support information and therefore the ability to deliver its transportation mission.

PUBLIC AND INTERNAL CONTACTS

The incumbent will interact with IT executive leadership, staff of other State Agencies including State Control Agencies, staff from local governmental agencies and staff working in the private sector to coordinate and respond to inquiries related to Division operations. In performing the responsibilities of this position, the incumbent may have contact with other departments, governmental agencies or private companies concerning information technology and business management best practices. Must develop and maintain strong working relationships with others.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for prolonged periods of time using a keyboard, monitor, mouse, and telephone. The incumbent must value cultural diversity and other individual differences in the workforce; adjust rapidly to new situations warranting attention and resolution; be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles; consider and respond appropriately to the needs, feelings, and capabilities of others; be tactful and treat others with respect. In addition, the incumbent must have the ability to multi-task, adapt quickly to changing priorities, and perform completed staff work or tasks and projects with short notice.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

Core Work Hours: Monday - Friday 8:00am-5:00pm. The incumbent may work after regular business hours and/or weekends to perform activities to support business operations. The incumbent must carry a cell phone and respond to calls after hours to support these business operations.

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

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.