Duty Statement

Classification: Information Technology Specialist III		
Working Title: Senior Portfolio Project Manager		
Program: Enterprise Technology Services (ETS)		
Division: Information Technology Strategy Services	Branch: Enterprise Project Management	
Section:	Unit:	
Office Location: 1500 Capitol Avenue, Sacramento, CA 95814		
COI Classification: ☑ Yes ☐ No	CBID: M01	Position Number: 802-382-1415-XXX
Telework Eligible: ☑ Yes ☐ No	Maximum Telework Days: (generally up to 3 days per week) 3 days per week	
Bilingual Position: ☐ Yes ☑ No	Specify Language: Not Applicable	

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively, both orally and in writing, when interacting with others; develop and maintain knowledge and skills related to specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely manner; and adhere to departmental policies and procedures regarding attendance and conduct.

Job Summary:

Under the broad administrative and policy direction of the Enterprise Technology Services (ETS) Enterprise Project Management Branch (EPMB) Chief, the Information Technology Specialist (ITS) III serves as a Senior Portfolio Project Manager that provides mastery-level expertise in portfolio project management, technology solutions, system integrations, procurements, contract financials, and vendor management. The ITS III will perform functions in the following domains: Business Technology Management (Business Analysis and Performance Management, Planning, Contract Administration, IT Strategic Planning); Project Management (Contract Management, Procurement Management, Cost Management); and System Engineering (Architecture, Design, Configuration, Operation and Maintenance of Systems).

The ITS III supports and provides expert guidance on the most complex Enterprise wide projects and modernization efforts within the Department of Health Care Services (DHCS), with an emphasis on Portfolio Management Services. This position functions as a Portfolio Project Manager (PPM) at the expert level, representing ETS by leading the planning and coordination of enterprise-level activities required to support interaction or integration with existing systems. The ITS III will establish a master schedule to manage the overall strategy for Portfolio Management Services, including contracts, deliverables, and coordination with divisions across DHCS. The ITS III will assemble and direct teams consisting of both state and contractor staff to complete tasks associated with the workload, including systems software engineering, and provide guidance on architecture, security, and complex technology modernization efforts.

The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of 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.

Description of Duties:	
% of Time	**Essential Functions**
	The ITS III is responsible for management and oversight of all phases of the Portfolio Management Services project life cycles. The ITS III leads and provides expert-level guidance for business analysis, research, and strategy development, supporting methodologies for the formation and administration of Portfolio Management Services. The role involves providing expert guidance and consultation to executives, stakeholders, and State/Federal control agencies, ensuring that quality products and services are procured and delivered in compliance with contractual terms and obligations. Additionally, the ITS III serves as a specialized consultant to the CIO on system design strategies for interaction or integration with existing systems and future system solutions, aligning with enterprise technology standards, federal guidelines, and program objectives.
30%	PROJECT MANAGEMENT & LEADERSHIP Serve as the Portfolio Project Manager (PPM) and leader on critical/complex IT and non- IT projects for all lifecycle stages: including project approval, initiation, planning, testing, execution, closure, maintenance, and operations. Develop, implement, and maintain industry standards, best practices, and methodologies for project management, utilizing both Waterfall and Agile methodologies, as required. Oversee the creation and management of project artifacts and documentation, including charters, Work Breakdown Structures (WBS), project plans, schedules, risk management plans, and contract management plans, ensuring compliance with State IT policies, Agile processes, and traditional SDLC (Software Development Life Cycle) processes. Demonstrate strategic leadership in project management concepts, including Agile project tooling capabilities and leadership, Agile experience, and extensive knowledge of Jira and Jira Align. Provide consultation on best practices and innovative technology strategies, conduct steering committee meetings, and present project status and risks to State and Departmental Executives, collaborating with the legislature and Control Agencies (Department of Finance and CDT). Lead day-to-day project activities, guiding both state and contract staff in a matrix-managed environment, scheduling and leading project-related meetings and discussions as needed.
30%	PROJECT OVERSIGHT AND OPERATIONS SUPPORT Serve as a strategic expert in developing and implementing IT project management oversight procedures for all IT projects. Provide consultation and guidance to IT and program staff on project management best practices. Advise and collaborate with other project managers and teams in guiding projects from concept through implementation, assisting with Agile project tooling and performance evaluations. Offer support for projects encountering issues and challenges, providing solutions to align with organizational goals, including operational decisions and system integration. Provide advanced organizational insights and guide executive leadership on the integration of various systems within the organization. Consult with

Description of Duties	
% Of Time	**Essential Functions**
	management and leadership on IT strategy and system implementation. Facilitate requirements analysis, system design, testing, and implementation of IT systems, guiding cross-divisional projects through matrix management structures. Prepare and provide project management training as needed.
25%	CONTRACT MANAGEMENT AND OVERSIGHT Lead project-related contract management and IT procurement activities, including drafting and reviewing procurement plans, Statements of Work, and Requests for Offer/Proposals. Provide leadership in managing project contracts, procurement planning, and vendor negotiations. Communicate with vendors to assess new technologies, negotiate contract modifications, and ensure compliance with contract specifications. Provide expert-level guidance on IT procurements supporting operational systems, ensuring sound architecture, secure data exchange, and system integration. Advise leadership on IT strategy, policy, and governance across the enterprise. Participate in contract staff selection, reviewing time sheets, and verifying contract deliverables. Lead special assignments requested by control agencies or executive management.
10%	PROJECT APPROVAL/ANALYSIS Serve as an expert advisor on project approval processes and reporting documentation. Lead the development of Feasibility Study Reports and manage the Project Approval Lifecycle (PAL) process, coordinating meetings, documentation, and approvals with CDT and Federal and State agencies. Draft Business Analysis reports and PAL stage-gate milestones. Contribute to IT project resource planning, Budget Change Proposals, and the IT Capital Plan. Provide expert knowledge on cloud technologies, trends, and architectures. Perform impact analysis and recommend implementation strategies for changes to State IT standards, ensuring procurement activities align with best practices.
% Of Time	**Marginal Functions**
5%	Other duties as required.

Supervision Received: Under Administrative Direction ____ by the (enter supervisor classification):

IT Manager II, EPMB Chief _____.

Supervision Exercised: (check all that apply)   ☑ Non-Supervisory Classification / None
☐ Clerical Staff   ☐ Analytical Staff   ☐ Technical Staff
☐ Professional Staff   ☐ Supervisory Staff   ☐ Managerial Staff

Special Requirements:
☐ Medical Evaluation /Clearance   ☐ Typing Certificate   ☐ Valid Driver's License
☐ Background Check / Finger Printing Clearance
☐ Valid Professional License (please specify): _____

Desirable Qualifications:

Working Conditions (Check all that apply):
Prolonged Periods of: Travel May be Required:
☐ Standing   ☐ Sitting   ☐ Kneeling   ☐ Bending   ☐ Occasional   ☐ Over Night
Requires Lifting of Heavy Objects up to: _____

Acknowledgements:

Human Resources Acknowledgement: The Human Resources Division has reviewed and approved this duty statement.

HRD Analyst Name:	HRD Analyst Signature:	Date:

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

Employee Name:	Employee Signature:	Date:

Supervisor Acknowledgement: I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

Supervisor Name:	Supervisor Signature:	Date:

Instructions

A duty statement is a description of tasks, functions, and responsibilities of a position to which an employee is assigned, and the percent of time spent on each task. It is based on objective information obtained by thoroughly analyzing the position's functions, the competencies and skills required to accomplish these functions, and the organizational needs of the department.

Classification:	Enter the legal title documented in the Classification Specifications which contains a formalized summary of the duties and responsibilities of the positions in a class.
Working Title:	Enter a working title if there is one. The working title differs from a classification title, as it can be specific to the duties the classification is performing. e.g., Personnel Liaison, Contracts Analyst, etc.
Program / Division / Branch / Section / Unit:	Enter the information that is in alignment with where the position is located in the organization. This should also mirror what is presented on the organization chart.
Office Location	The term office location refers to the state worksite that is the employee's reporting location when not teleworking.
Position Number:	Enter the agency, unit, class code, and serial number of the vacant position being filled. e.g., 808-202-5393-810
Telework Eligible:	Check 'Yes' if this position is eligible for a telework schedule. If 'Yes' is checked, in the next field enter the maximum number of telework days allowable for this position. Check 'No' if this position is not eligible for a telework schedule.
COI Classification:	Check 'Yes' if this position is designated under the Conflict-of-Interest Code. The position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment. Failure to comply with the Conflict-of-Interest Code requirements may void the appointment. Check 'No' if this position is not designated under the Conflict-of-Interest Code.
Collective Bargaining Identifier (CBID)	Enter the CBID. The CBID information can be found in the CalHR Pay Scale. Select option 15 for an alphabetical listing of Classifications. Find your classification. The CBID will be located in the last column on the right. For the CBID information, include the appropriate letter (M, S, C, R) and the unit number.
Bilingual Position:	Check 'Yes' if this position is bilingual certified. If 'Yes' is checked the language for which the position is bilingual certified must be specified in the next field. Check 'No' if this position is not bilingual certified.
Job Summary:	Include a brief description of the position, duties performed, reporting structure, and any pertinent information you feel is necessary.

Description of Duties:	Provide an itemized listing of the specific job duties and the percentage of time spent on each separate and distinct task. The essential and marginal functions should be identified. Group related tasks under the same percentage with the highest percentage first. Percentages must be listed in descending order and must equal 100%.
	Essential Functions: Assess whether the performance of a function is 'essential' by asking yourself why the position exists and what is it the employee is being hired to do. As you review each task, ask yourself whether it is a basic, necessary, and integral part of the job, which would make that task essential. Ask yourself, does the position exist solely to perform that function? Are there a limited number of employees available to perform that function? Is it a highly specialized function? If so, the task may be 'essential'.
	Marginal Functions: Marginal functions are incidental and only account for a minimal part of the job. They are secondary to essential functions, and they make up the remaining duties of the position. Keep in mind that marginal functions can also be absorbed by another staff member so if they were to be removed, it doesn't change the concept of the position.
Supervision Received:	Check the nature of the supervision received and enter the classification of the supervisor. Review the Classification Specifications and see the descriptions below to help determine the type of supervision this position receives.
	Under Close Supervision: Used for entry-level classes in which an employee is learning the duties of the class as a trainee or apprentice.
	Under Supervision: The position is subject to continuous and direct control.
	Under General Supervision: The position is subject to a minimum of continuous and direct control.
	Under Direction: Indicates that supervision is general and not close, continuous, or concerned with details. The statement tends to be used with technical and professional positions where the employees are expected to operate with a reasonable degree of independence, or as a journeyperson or fully qualified worker.
	Under General Direction: This usually refers to classes on the division level that receive administrative direction. The guidance is usually outlined in legislation and general rules of the organization.
	Under Administrative Direction: This is usually used only in classes involving top-level, administrative positions in which the guidance is largely that of overall policy and the requirements of legislation.
Supervision Exercised:	Check 'Yes' if this position exercises supervision. If 'Yes' is checked, select all classification types supervised by this position.
	Check 'No' if this position does not exercise supervision.
Special Requirements:	Enter any requirements that may be necessary per classification specification or specific department, i.e., background check, drug test, medical license, etc.
Desirable Qualifications:	Enter any knowledge, skills and abilities and other desirable qualifications, such as special personal characteristics, interpersonal skills, etc., not required as part of the minimum qualifications but represent additional attributes being sought after by the hiring manager.

Working Conditions:	Describes the working conditions of the job, i.e., physical demands, if the job is indoor/outdoor, if travel is required and how often, varying schedule, transportation information, etc.
Human Resources Acknowledgement:	Completed by Human Resources Division to indicate the last date of review.
Employee Acknowledgement:	Employee signs and dates the document certifying that the duties of the position were discussed with the supervisor and that a copy of the duty statement was received.
Supervisor Acknowledgement:	Supervisor signs and dates the document certifying that the duty statement represents an accurate description of the essential functions of the position, and that the duties of the position were discussed with the employee. Once signatures are obtained, make two copies, and place a copy in the supervisor's drop file and provide one to the employee. Send the original to Human Resources Division to file in the employee's Official Personnel File (OPF).