Employment Development Department
State of California

☐ Current
☒ Proposed

POSITION STATEMENT

1. POSITION INFORMATION

CIVIL SERVICE CLASSIFICATION: Information Technology Specialist II	WORKING TITLE: IT Project Financial Lead
NAME OF INCUMBENT:	POSITION NUMBER: 280-351-1414-976
SECTION/UNIT: Project Controller Section/ Project OversightGroup	SUPERVISOR'S NAME:
DIVISION: EDDNext	SUPERVISOR'S CLASSIFICATION: Information Technology Manager I
BRANCH: EDDNext Modernization and Innovation Branch	REVISION DATE: 10/30/2023

Duties Based on: ☒ Full Time   ☐ Part Time – Fraction _____   ☐ 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 the general direction of the Information Technology Manager I, the Information Technology Specialist II (ITS-II) serves as the IT Project Financial Lead in the EDDNext Modernization and Innovation Branch. The ITS-II is responsible for leading and managing EDDNext's most complex IT projects, comprised of IT budget development and cost reporting for IT projects, IT contract administration, IT business analysis and performance management, process reengineering, and IT strategic planning. The ITS-II is responsible to act as the primary lead on these projects to ensure schedule, budget, and scope is maintained and requirements met throughout the lifecycle of said projects. The ITS-II ensures governance and compliance utilizing a high level of skill, experience, and working knowledge across multiple project management methodologies to achieve project, organization, and team success.

The ITS-II must possess and demonstrate a depth of leadership and expertise in managing IT project finances; and understand the industry standards, principles, methods, and techniques, to deliver an effective IT product, program solution, service, or system. The incumbent performs a variety of analytical and sensitive tasks requiring innovative problem-solving where guidance is not readily available. Responsibilities include, but are not limited to, leading activities and planning, developing, organizing, coordinating, and maintaining project budgeting activities. This includes assisting with the preparation of Budget Change Proposals (BCP), forecasting resource requirements, and cost monitoring and reporting to internal and external customers. The ITS-II interfaces with the project team to share financial results and future projections; and leads the project team through financial processes required for the project. This includes assisting in the generation of CA Project Approval Lifecycle (PAL) documents and Financial Analysis Worksheet (FAWS) documents.

The incumbent contributes toward growth of the EDDNext Branch into a customer focused service organization by following Branch cultural principles and by providing constructive feedback to others within the Branch regarding the application of those principles.

The ITS-II works collaboratively with the EDDNext management team and staff, briefs and advises managers, exercises initiative and independence of action, and demonstrates tact and good judgement. The incumbent communicates effectively in order to develop and maintain cooperative working relationships. The incumbent adapts easily to changing priorities and maintains consistent, predictable attendance in the performance of these specific functions.

Percentage of Duties	Essential Functions
35%	Manages EDDNext's project plans and activities, and audits IT budget and cost monitoring activities using IT systems, methodologies, processes, and following all control agency guidelines and policies. Consults with management and/or project managers on a wide variety of technical and administrative duties. Develops, refines, and advises on monthly reports using IT expenditure data for personal services and Operating Expenses & Equipment. Manages the IT budget tracking system. Plans, develops, and implements technological solutions that are essential to the mission of the overall organization. Develops time sensitive, monthly IT project cost reports, which are distributed to the project managers and to control agencies for formal reporting on reportable projects.
20%	Develops, refines, and consults on analyzing project proposals and supporting documentation for the development of budgets for IT projects. Implements processes to lead analysis using established templates and guidelines to prepare Budget Change Proposals (BCPs), Spring Finance Letters, and May Revise Letters to request project funding. Advises the Project Controller, Project Administrator, and Project Managers to develop proposals following the PAL process for submittal to control agencies ensuring compliance with state policies, legislative or regulatory changes, and departmental/Agency directives. Develops, refines, and consults on necessary changes to the proposal with project management to ensure documents are well written and the workload justification supports the request. Advises management on written recommendations like the quality of proposals, consistency with policy

	guidelines, past submittals and declarations of the department including whether the proposal should be approved, modified, or denied.
20%	Develops, refines, and consults on reviewing cost information included in Financial Analysis Worksheets (FAWs) for IT projects as part of the PAL process. Advises management on review and approval of Stage/Gate deliverables, Special Project Reports, Supplemental Budget Requests, BCPs, and Post Implementation Evaluation Reports including the associated FAWs.
10%	Consults, reviews, and advises on IT contract administration and IT contract processes including preparing, tracking, and submitting contract invoice clearance packages. Develops processes with project managers and vendor staff to ensure that documents are submitted according to contract stipulations. Follows through to ensure that invoices are submitted timely for payment. Develops new templates and reports based on established templates to analyze financial transactions, utilizes burn rate to forecast expenditures, and assists with communicating contract funding implications to project managers. Develops, refines, and advises on project forecasting tools to assist the project team with effective financial planning.
10%	Implements, refines and performs analysis on IT processes, workloads, operational services, customer relations, and communicates with subject matter experts within the IT Branch and/or business units to identify issues, problems, and opportunities and submits IT solution recommendations. Research, develop, and implement IT project financial solutions based on technology trends, standards and best practices in order to streamline existing IT processes using business process improvement methodologies. Provides advisory assistance to management in order to meet EDDNext Branch strategic plans that are aligned with the Department's goals and objectives.

Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT (Choose all that apply)

Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 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:	

Type of environment:

☐ High Rise   ☒ Cubicle   ☐ Warehouse   ☐ Outdoors   ☒ Other: Offsite Remote Teleworking

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

Supervision Exercised: May serve as a lead or mentor but does not supervise.

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		
Classification and Pay Unit (CPU) Approval		
☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, 625 on file.	CPU Analyst initials dmg	Date approved 3/29/2024
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