

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Information Technology Specialist I	OFFICE/BRANCH/SECTION D20 IT/PBMD/Business Management	
WORKING TITLE Technology Business Management Administrator	POSITION NUMBER 900-170-1402-924	REVISION DATE 02/19/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

**GENERAL STATEMENT:**

Under the direction of the IT Manager I, Business Management Section (BMS) within the Project and Business Management Division (PBMD), the IT Specialist I (ITS I) will lead the effort to build out and mature, as well as support and maintain, the technology business applications that supports our IT resources. The ITS I serves as a subject matter expert with a working level knowledge of one or more business areas: Technology Business Management, Business Analysis, Budgeting, IT Purchasing, Accounts Payable, and General Ledger. The incumbent will provide functional analysis and working knowledge of data processing concepts, practices and methods to end users regarding the Technology Business Management (TBM) framework and associated applications. The ITS I performs activities of the System Development Life Cycle which includes analysis, design, build, test, maintenance and operations. This includes timely communication and resolution of reported issues by end users. Additionally the incumbent provides data management, data analysis, and reporting functions within the enterprise Technology Business Management (TBM) application, such as Apptio, and will act as lead in troubleshooting, creating, and interpreting reports/dashboards to meet business user requirements.

Domain:

Business Technology Management

IT Project Management

**CORE COMPETENCIES:**

As an Information Technology Specialist I, 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. (Employee Excellence - Innovation, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Innovation, Stewardship)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **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. (Employee Excellence - Innovation, Integrity, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- **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. (Employee Excellence - Innovation, Stewardship)
- **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. (Employee Excellence - Collaboration, Stewardship)
- **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. (Employee Excellence - Collaboration, Innovation, Integrity, Stewardship)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Employee Excellence - Innovation, Integrity, Stewardship)

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**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
45%	E	Leads one or more teams and/or projects. Serves as the Technology Business Management (TBM) Administrator responsible for organizing, planning, model configuration, data gathering, trouble shooting and ongoing development of the TBM model and applications for IT. Gather functional and business requirements and translate information into a working set of operational and financial models, dashboards, and management reports. Validate requirements and ensure they are complete and perform requirements traceability through all phases of the Project Management Life Cycle and System Development Life Cycle (SDLC). Serves as the technical subject matter expert in the TBM model and ensures the solution, applications, and /or tools meet the business requirements and that State and industry best practices are being employed. Collaborates with IT Executives and Management on IT Total Cost of Ownership, financial metrics, and cost transparency initiatives. Resolves complex problems related to configuration, data quality, and system enhancements. Leads efforts to develop and mature data sources, system enhancements, process re-engineering, report accuracy, and ensure adaptability to changing business needs. Ensure report development processes and technologies are aligned to IT and Business strategies; report results to managers and stakeholders, as necessary. Lead efforts to develop interfaces between different systems,(e.g. ServiceNow, Apptio) and other necessary technical outputs.
25%	E	Applies the Business Analyst Body of Knowledge (BABOK) principles, methods, and techniques when leading or participating in Joint Application Development (JAD) sessions. Works closely with managers, executives, and other IT staff, one on one or in groups, to identify requirements for system enhancements, dashboards and reporting needs. Implement enhancements and develop dashboards and reports using multiple data sources. Oversee processes and technologies necessary to plan, build, manage and execute automated reports (e.g. Spend Plan, IT Cost Report, etc) and dashboards for display via the TBM application; allowing drill through capability to detailed data. Lead in the development, review, and execution of standards to ensure processes are repeatable and data is being pulled accurately and efficiently. Analyze output from TBM application and communicate results to relevant parties. Identify use-cases, data, and process improvement opportunities. Performs the analytical work of fit-gap analysis, requirements elicitation, alternatives analysis, and other essential IT project work. Work with other subject matter experts and project stakeholders to define and refine in order to grow the current applications. Document all feedback from customers and business programs, identify business areas that need improvement and collaborate with team members to deliver recommendations. Serve as a change agent to ensure the solution is accepted by stakeholders. Create and document various test plan. Participate in User Acceptance Testing on assigned projects. Work with the technical team to ensure testing environment and data are ready for testing.
25%	E	Develop and manage the IT Spend Plan leveraging the TBM business module. Implement tools to track the IT budget, expenditures, and allocations. Monitor and report on personal services and operating expenditures and projections. Makes recommendations and provides detailed expenditure and projection reports to management. Work closely with the team through meetings and email communication to track and analyze expenditures to ensure overall management of resources within approved funding levels.
5%	M	Maintain and upgrade technical skills and awareness of current best practices based on research as it applies to departmental and statewide financial management processes. Additional duties may include assisting where needed within the team/unit, which may include special assignments.

<sup>1</sup>ESSENTIAL 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 may require the incumbent to lead small teams to achieve common goals and objectives.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of: Principles, techniques, and procedures related to the delivery of information technology services and key business areas (Budgeting, IT Purchasing, Accounts Payable, and General Ledger); the System Development Lifecycle including the

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associated methodologies, tools, and processes; the organization's business processes and procedures; education tools and techniques; performance monitoring tools and techniques; and data administration techniques and best practices. Information technology governance principles and guidelines to support decision making; complex and mission critical business processes and systems; principles, methods and procedures for designing, developing, optimizing, and integrating systems in accordance with best practices; system specifications design, documentation, and implementation methodologies and techniques. Ability to: Use initiative; act independently with flexibility and tact; use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems; perform technical analysis of proposed technology solutions; comprehend technical documents to interpret specifications, system implementations, capabilities, interdependencies, and compatibilities; serve as a technical liaison; develop and effectively utilize all available resources; develop end-user training materials; and gather data to perform statistical analysis and report outcomes. Formulate and recommend policies and procedures; perform effectively in a fast-paced environment with constantly changing priorities; establish and maintain project priorities; apply federal, state, department, and organizational policies and procedures to state information technology operations; apply systems life cycle management concepts used to plan, develop, implement, operate, and maintain information systems; positively influence others to achieve results that are in the best interests of the organization; consider the business implications of the technology to the current and future business environment; communicate change impacts and change activities through various methods; conduct end-user training; collaborate closely with technical subject matter experts such as database administrators, network engineers, and server administrators to ensure systems are secure and meet compliance requirements; assess situation to determine the importance, urgency, and risks to the project and the organization; make decisions which are timely and in the best interests of the organization; provide quality and timely ad hoc project information to executives, project team members, and stakeholders; develop decision making documents; and assess and understand complex business processes and customer requirements to ensure new technologies, architectures, and security products will meet their needs.

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**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 may prevent the incumbent from effectively supporting the Department's IT projects.

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**PUBLIC AND INTERNAL CONTACTS**

The incumbent will be called upon to interface closely with program, technical and IT staff and management within the Department. In performing the responsibilities of this position, the incumbent may initiate contacts with other departments, have contact with Government and/or Control Agencies such as the Department of General Services or the Department of Technology Services; vendors of commercial tools that may be adopted by the Department; or outside consultants concerning successful project delivery.

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**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

The incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone and may be required to lift and move supplies and equipment from one location to another. The incumbent must be able to walk between multiple State buildings and have a thorough knowledge of Caltrans building locations. This is a fast-paced job with a lot of deadlines. Thus, the incumbent in this position will be required to multi-task, be open to change, adapt to changes in priorities and policies, and to complete tasks or projects with short notice. The incumbent must be able to sustain mental activity needed for problem solving which includes reading, writing, analyzing, understanding, interpreting, consulting, developing alternatives, drawing sound conclusions, and recommending, implementing, and evaluating solutions. The incumbent must be able to exercise sufficient control over emotions to gain and maintain the confidence and respect of others, recognizing and acknowledging emotionally charged issues or problems and responding appropriately to them.

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**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. If not working remotely, the employee will work in a climate-controlled office under artificial lighting using a personal computer.

The employee may be required to travel. When available, a State vehicle will be provided. Possession of a valid driver's license is required when operating a State owned or leased vehicle. If the employee utilizes their own personal vehicle, they may be reimbursed for travel expenses. Some weekend or after-hours may be required. The employee must carry a cell phone and

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respond to calls after hours.

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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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE

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