

POSITION DUTY STATEMENT

DFPI-HRO 203 (Rev. 08-21)



NAME [Employee]	EFFECTIVE DATE [Actual Start Date]
CLASSIFICATION TITLE Information Technology Specialist I	POSITION NUMBER 410-113-1402-401
WORKING TITLE Project Manager	DIVISION/OFFICE/UNIT/SECTION Executive/Information Technology Office/ Planning and Portfolio Management Office
BARGAINING UNIT R01	GEOGRAPHIC LOCATION Sacramento or San Francisco

General Statement:

Under the direction of the Information Technology (IT) Project & Portfolio Office Manager (IT Manager I), the Information Technology Specialist I (ITS I) is responsible for project management of small to medium complexity information technology projects while following frameworks defined by the Project Management Institute, the California Project Management methodology, and the DFPI Project Management Office procedures. The project manager may work under the direction of more senior project managers and operate as a project coordinator, contract manager, or as a business analyst for larger and more complex projects. The incumbent demonstrates a high level of organizational skills utilizing methodologies, processes, and best practices based on the Project Management Body of Knowledge (PMBOK), California Project Management Methodology (CA-PMM), and California Department of Technology Project Approval Lifecycle (PAL).

This position will primarily focus within the IT Project Management and Business Technology Management domains.

A. Specific Assignments [Essential (E) / Marginal (M) Functions]:**45% (E) Information Technology Project Management**

Serve as Project Manager for reportable and non-reportable projects, responsible for organizing the project, developing project cost estimations and project plans, determining resource requirements, as well as executing projects through their entire lifecycle. The project manager will apply industry standards using the Project Management Body of Knowledge (PMBOK) and California Project Management Framework (CA-PMF) principles, methods, and techniques to manage all aspects of projects ranging in complexity based on business and technical factors, through all phases of the Project Management Life Cycle, Project Approval Life Cycle (PAL), Project Delivery Lifecycle (PDL), System Development Life Cycle (SDLC), including people, resources, and schedules. The Project Manager ensures the project is in scope, on schedule, and within the approved budget.

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The Project Manager is responsible for conducting meetings, providing executive and senior management briefings, managing the project budget and schedule, managing the project's risk and issues, and working with functional managers to manage project resources. Maintains the tools that serve as the central repository for all project documentation and as a communication tool for the project team and clients.

The project manager is responsible for vendor management, including managing contract costs, and verifying/approving contract deliverables.

When leading or participating in business analyst deliverables, apply industry standards using the Business Analyst Body of Knowledge (BABOK) principles, methods, and techniques for: requirements elicitation, requirements review and prioritization, alternatives analysis, market research, fit-gap analysis and provide guidance as needed.

The project manager is responsible for completing project closure activities and Post Implementation Evaluation Review (PIER) documentation with an emphasis on aggregating project cost data and lessons learned for using in future projects.

20% (E) Information Technology Project Management

Assists in the intake of project requests, development of business cases, and development of rough order of magnitude (ROM) budgets for new projects. Assists the development of project-related budget change proposals (BCPs) to secure funding and resources for projects. Develop procurement strategies and procurement document (RFIs, RFOs, RFPs) to acquire project resources while coordinating with the appropriate DFPI teams.

15% (E) Information Technology Project Management Oversight/Co-Project Manager

Works as co-project manager on projects where system integrators perform most of the work. In an oversight role, ensure that the consultant project team adheres to best practices and acts in the best interest of the department. Ensure schedule, budget, risks and issues are properly documented, communicated according to DFPI/State standards and according to the associated contract. Co-Author Work Authorizations and ensure proper acceptance of project deliverables.

15% (E) Processes and procedures

Develop and implement processes, procedures, methodologies, templates, and toolsets relating to the functions of the project management office, based on industry standard best practices, departmental needs, and control agency requirements. Lead or participate in process improvement efforts to remove inefficiencies within the unit or division.

5% (M) Other

The incumbent will perform other duties in the specified domain(s) as needed.

B. Supervision Received

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The Information Technology Specialist I reports directly to and receives the majority of assignments from the IT Project & Portfolio Manager (IT Manager I); however, direction and assignment may also come from a more senior project manager, other IT Managers, and the Chief Information Officer (CIO).

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The Information Technology Specialist I will interact as needed with:

1. DFPI Executive, Program, and IT Staff
2. California Department of Technology (CDT) and other IT Project oversight agencies

F. Actions and Consequences

The Information Technology Specialist I plans and organizes information technology, security and project management workloads as well as leading the delivery of software services. The inability to operate in this capacity would have a significant impact on IT's ability to deliver critical projects and products to projects in a timely, well-organized manner.

G. Functional Requirements

Works primarily onsite, with one day of Telework available with an approved Telework agreement on file.

The incumbent works 40 hours per week. The use of a computer, telephone, copier, and fax machine is essential to the duties of this position.

Some weekend or after-hours may be required.

H. Other Information

Exercises good judgment in decision-making, exercises creativity and flexibility in problem identification and resolution, and manages time and resources effectively. Works well with others, under changing priorities, and work irregular hours when workload dictates. Regular attendance and punctuality are essential. Possesses good written and verbal communication skills. Ability to compile data, analyze, summarize, and present findings to internal and external stakeholders, including senior and executive management teams and vendors.

CONFLICT OF INTEREST

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This position is subject to Title 10, § 250.30 of the California Code of Regulations, the Department of Financial Protection and Innovation’s Conflict of Interest Regulations, the incumbent is required to submit Statements of Economic Interests (Form 700) within 30 days of assuming office, annually by April 1st and within 30 days of leaving office.

FINGERPRINTING

None

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Employee’s Printed Name, Classification

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

Supervisor Signature

Date

Supervisor’s Printed Name, Classification