

ALERT: This form is mandatory for all Requests for Personnel Action (RPA).
INSTRUCTIONS: Before completing this form, read the instructions located on last page.

Section A: Position Profile

A. DATE 12/3/21	B. APPOINTMENT EFFECTIVE DATE	C. INCUMBENT NAME
D. CIVIL SERVICE CLASSIFICATION Information Technology Manager I		E. POSITION WORKING TITLE Section Chief
F. CURRENT POSITION NUMBER 695-340-1405-007		G. PROPOSED POSITION NUMBER (Last three (3) digits assigned by HR)
H. OFFICE / SECTION / UNIT / PHYSICAL LOCATION OF POSITION Customer Engagement Services / Rancho Cordova		I. SUPERVISOR NAME AND CLASSIFICATION Crystal Holcomb, IT Manager II
J. WORK DAYS / WORK HOURS / WORK SHIFT (DAY, SWING, GRAVE) MON-FRI 8:00 AM – 5:00 PM		K. POSITION REQUIRES: <input type="checkbox"/> FINGERPRINT BACKGROUND CHECK YES <input checked="" type="checkbox"/> NO <input checked="" type="checkbox"/> DRIVING AN AUTOMOBILE YES <input type="checkbox"/> NO

Section B: Position Functions and Duties
Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).

Information Technology Domains (Select all domains applicable to the incumbent's duties/tasks.) <input checked="" type="checkbox"/> Business Technology Management <input checked="" type="checkbox"/> IT Project Management <input checked="" type="checkbox"/> Client Services <input type="checkbox"/> Information Security Engineering <input type="checkbox"/> Software Engineering <input type="checkbox"/> System Engineering

	Organizational Setting and Major Functions Under general direction of the Customer Engagement Services (CES) Information Technology Manager II (IT Mgr II), the Information Technology Manager I (IT Mgr I) manages and oversees one of two Account Manager Teams. The IT Mgr I provides leadership, supervision, guidance, mentoring and support for the staff within the Account Manager and Customer Service Teams; interacts with data center staff and customers at all levels to ensure the highest level of customer service possible; and manages administrative processes, including budget planning and tracking and authorizations for vacation, sick leave, overtime and travel.
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<p>% of time performing duties 35%</p> <p>30%</p>	<p>Essential Functions (Percentages shall be in increments of 5, and should be no less than 5%.) <u>Provide Direction and Oversee work performed by Staff:</u></p> <ul style="list-style-type: none">• Meet biweekly with each Account Manager Team member to discuss customer accounts/strategic direction, status of service requests, and service agent role (including updated processes, elevator speeches, etc.).• Act as escalation point for Account Manager Team when customer issues arise.• Assist with planning, development, design, and implementation of technical solutions essential to the customers' missions and ensure the monolithic/silo applications are no longer perpetuated in future system development.• Ensure that each Account Manager is actively engaged in an office work team and is a prolific contributor to the team's efforts.• Actively work to enhance staff morale. <p><u>Leadership/Management:</u></p> <ul style="list-style-type: none">• Provide CDT and Statewide IT policy guidance, clarification and technical assistance in the planning, transitioning and implementation of solutions required to meet current and future IT needs of each account.• Develop and maintain account profiles including detailed information on customer applications and criticality, services used, future projects and processes, and use account profiles to improve service quality by better understanding customers and their business needs.• Collaborate with internal staff on process and service improvement, communicating collaborative efforts.• Conduct periodic audits of the account library to ensure the content is maintained by CDT service areas.• Establish and model standard practices and tools used by CES teams, including devices (e.g. laptops), media (e.g. Instant Messaging, SharePoint), and applications (e.g. the Service Catalog, Remedy and CRM).• Help develop and monitor the CES budget.
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- Oversee management of Customer Relationship Management system maintenance and enhancements, account profile processes, customer escalation processes and communication of processes, standards and procedures to customers.
- As a member of the CES management team, provide direction to staff regarding CDT's current priorities. As needed, fill in for the Branch ITM II.
- Help translate organizational goals into office goals.
- Participate in management meetings, hold team meetings with reporting staff, and occasionally represent the office at CDT meetings.
- As a member of the CES management team, ensure that staff, customers and documentation are updated to capture current CDT initiatives and other efforts.

Supervision:

20%

Perform day-to-day management activities for the Office.

- Develop plans to accomplish office goals and objectives in accordance with organizational mission and strategic plan; support and advocate management's philosophy, policies, and procedures.
- Evaluate supervisors on completion of their supervisory responsibilities; develop and update duty statements as needed; establish performance expectations; complete individual development plans annually; complete probationary reports on a timely basis; and other performance management activities including adherence to the State's progressive discipline policy including taking corrective or disciplinary action as necessary.
- Responsible for making informed and defensible administrative and personnel management decisions in accordance with CDT and State policies, personnel-related laws, rules; established CDT administrative processes and procedures; and collective bargaining agreements.
- Ensure staff comply with all CDT policies; office standard operating procedures; and department and agency protocols.
- Encourage unit team building; facilitate cross-training; and promote continuous improvement of processes. Implement motivation techniques; promote training; and create a positive climate for change.
- Foster methods of creative decision-making and problem solving and provide continuous feedback to unit supervisors and office.
- Ensure that Account Managers complete the tasks outlined in their duty statements, and the individuals assignments they have.
- Set performance expectations for the Account Managers and review their work to determine whether the expectations are being met, provide constructive input as needed.

Strategic Planning:

10%

- Facilitate collaboration amongst the account team's suite of customers to identify common needs and develop shared, cost-effective solutions that align with the State Strategic Plan.
- Implement the CES Business Plans (strategic, operational, and risk) and performance tracking.
- Participate in the development and implementation of the CES Business Plan.
- Lead staff in developing plans and goals to ensure the office's and CDT's Strategic goals are met.
- Monitor progress towards goals, and report to upper management regularly.

Marginal Functions (Percentages shall be in increments of 5, and should be no more than 5%.)

Analysis:

5%

- Ensure information gathering and analysis of revenue potential from customers for use in CDT strategic planning.
- Ensure the analysis of incidents, work orders and service requests, determine trends and recommendations for service improvements based on the results.
- Ensure the analysis of customer service usage and development of proposals for improvements or cost-saving measures.

Work Environment Requirements

- Job duties require presence at the CDT site primarily during normal business hours and may attend customer meetings offsite.
- Carry a mobile device during working hours and off-shift for special assignments, and work evenings and weekends as required to complete assignments.

- Use a laptop computer at meetings and other events; use desktop virtualization software from off-site locations; access various CDT applications or systems for information and data analysis; and use instant messaging and other IT tools to enhance communication.

Allocation Factors (Complete each of the following factors.)

Supervision Received:

The IT Mgr I receives general direction from the IT Mgr II. The IT Mgr I operates independently on the most complex account management issues. Work products are typically reviewed by the IT Mgr II, the CES Deputy Director, or other executive staff.

Actions and Consequences:

Decisions and recommendations made by the IT Mgr I to Account Manager staff have serious and significant economic impact to customer programs and IT systems. The consequence of poor decision, judgment or advice or, inadequate research may have a negative or serious impact on the reputation of CDT and customer confidence in the services provided by CDT, as well as a negative impact on the budgets of customers and CDT

Personal Contacts:

The IT Mgr I will be involved with CDT technical, executive and administrative staff, as well as same for customer departments. The IT Mgr I will have a wide circle of contacts, including the fore-mentioned plus vendors and contractors, and will need to collaborate in a range of professional situations.

Administrative and Supervisory Responsibilities (Indicate "None" if this is a non-supervisory position.)

The IT Mgr I collaborates with other CES staff on business planning, tracking, and measurement, including budget and cost control issues. The incumbent is responsible for recruiting, selecting, placement and development of the direct report staff, and also participates in the hiring panels for other positions within CES.

Supervision Exercised:

The IT Mgr I is responsible for developing and leading Account Manager Team members.

Other Information

Desirable Qualifications: (List in order of importance.)

- Supervisory experience in technical service areas.
- Technical expertise on a wide range of IT subjects, a thorough understanding of industry trends, and CDT services.
- Expertise in the State's budget process, legislative and administrative procedures, procurement documents and procedures, licensing issues, and the roles and responsibilities of oversight and regulatory agencies.
- Mastery level communication and presentation skills.
- Ability to develop positive working relationships with, and provide leadership to, all levels of State staff and external stakeholders.
- Expertise in requirements analysis principles, cost-benefit principles and methods, and risk management techniques.
- Expertise in defining business and technical requirements, evaluating plans and outcomes, and leading the development of IT documents, such as S1BAs, RFPs, and BCPs.
- Understanding of industry trends, the State Strategic Plan, CDT shared services, and how emerging technologies might enhance CDT's ability to meet future customer needs.
- Ability to use technology and repeatable processes to achieve the highest level of productivity.
- Mastery level IT knowledge, change management processes, performance measurement methods, statewide protocols and procedures; and governmental, RFP, budget and project approval processes.

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

INCUMBENT NAME (PRINT)	INCUMBENT SIGNATURE	DATE
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SUPERVISOR STATEMENT: I have discussed the duties of this position with the incumbent.

SUPERVISOR NAME (PRINT) Crystal Holcomb, IT Manager II	SUPERVISOR SIGNATURE	DATE
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Instructions

Copies and Distribution	<ul style="list-style-type: none"> • <u>Current and Proposed Duty Statements</u>: Submit with Request for Personnel Action (RPA) package. • <u>Approved Duty Statement</u>: Supervisor reviews with incumbent; both supervisor and incumbent must sign and date. • <u>Signed Copies</u>: Original to supervisor; copy to incumbent; scanned/electronic version emailed to Human Resources. 		
Section A: Position Profile	Complete Sections A through K. If position number is changing, complete sections D, E, G, and H using the proposed position information. If incumbent's name is known, complete section C.		
Section B: Position Functions & Duties	Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).		
Information Technology Domains	Select all domains applicable to the incumbent's duties/tasks.		
Organizational Setting and Major Functions	Provide a <u>brief</u> description of the position's reporting relationship, primary role, and purpose.		
Essential Functions	Identify the fundamental job duties of the position that must be performed, with or without reasonable accommodation. NOTE: Essential Functions shall be properly aligned with the classification specification. Percentages shall be in increments of 5, and should be no less than 5%. The total percentage of all functions (essential and marginal) must equal 100%. Per Government Code section 12926.1 (a-c), a job function or task may be considered an essential function for several reasons, including, but not limited to: <ul style="list-style-type: none"> • The position exists to perform the function. • There are a limited number of other employees available to perform the function, or among whom the function can be distributed. • The function is highly specialized; the person is hired for special expertise or ability to perform the function. • Removal of the function would fundamentally alter the job. To write essential functions for the position: <ul style="list-style-type: none"> • Identify the major functions of the job. Most positions have five to seven major functions. • Identify the specific tasks associated with each major function (include end products). • Identify the level of work and why the work is done. The below is an example of how to write an essential function and the associated task statements: ESSENTIAL FUNCTIONS <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; padding: 5px; vertical-align: top;">45%</td> <td style="padding: 5px;"> Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> <ul style="list-style-type: none"> • Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. • Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. • Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda]. </td> </tr> </table>	45%	Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> <ul style="list-style-type: none"> • Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. • Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. • Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda].
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Marginal Functions	Identify functions or tasks that are performed, but are not fundamental duties of the position. These are functions or duties that can be assigned to another employee and can be characterized as non-essential or marginal. The phrases "perform other related duties" or "perform other related work" can be used in the marginal functions field. NOTE: Percentages shall be in increments of 5, and should be no more than 5%. The total percentage of all functions (essential and marginal) must equal 100%.		
Work Environment Requirements	Identify physical or mental requirements, work conditions, hazards, and equipment used on the job and required to perform the essential functions of the job. NOTE: Specify in this section if a fingerprint background check is required.		
Allocation Factors	<ul style="list-style-type: none"> • <u>Supervision Received</u>: Identify the scope of initial instruction, how work is supervised while in progress, and nature and purpose of final review. • <u>Actions and Consequences</u>: Identify in what areas judgment, decisions, and recommendations are made, and probable effects of poor decisions or recommendations. • <u>Personal Contacts</u>: Identify with whom, how frequently, and for what purpose personal contacts are required with persons outside of the immediate work group. • <u>Administrative and Supervisory Responsibilities</u>: Briefly identify the extent of participation in management functions (e.g., planning, budgeting, cost control, reporting, selecting, placement, and development of personnel). Indicate "None" if a non-supervisory position. • <u>Supervision Exercised</u>: Identify the type of supervisory responsibility exercised and indicate whether supervision is a responsibility of the position or of a lead nature. 		
Other Information	Identify any significant factors or special requirements for this position that are not included elsewhere on this form. <ul style="list-style-type: none"> • <u>Desirable Qualifications</u>: Identify any special personal characteristics, interpersonal skills, additional qualifications, specific business needs, and additional attributes that will enhance the incumbent's ability to perform a particular function. (e.g., professional certification or license, general or specialized knowledge in the field, ability to qualify for a fidelity bond, aptitude for investigative work, skills and abilities above the required minimums.) NOTE: Please list the desirable qualifications in order of importance, as they will be listed on the Job Opportunity Bulletin (JOB). 		