

DUTY STATEMENT

1. POSITION INFORMATION							
Civil Service Classification Information Technology Specialist I	Working Title Portfolio Manager						
Employee Name vacant	Position Number 791-500-1402-079						
Project/Division Name OAIO	Supervisor's Name Vacant						
Unit Portfolio Support Services	Supervisor's Classification Information Technology Supervisor II						
Physical Work Location 2495 Natomas Park Drive, Suite 540	Duties Based on: <input checked="" type="checkbox"/> Full Time <input type="checkbox"/> Part Time - Fraction						
Effective Date TBD							
2. REQUIREMENTS OF POSITION							
<p>Check all that apply:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><input checked="" type="checkbox"/> Conflict of Interest Filing (Form 700) Required</td> <td style="width: 50%;"><input type="checkbox"/> Requires Fingerprinting & Background Check</td> </tr> <tr> <td><input type="checkbox"/> May be Required to Work in Multiple Locations</td> <td><input type="checkbox"/> Other (<i>specify below in Description</i>)</td> </tr> </table> <p>Description of Position Requirements (e.g., the position may move from project to project upon business need, managing staff at an alternate location, graveyard/swing shift, frequent travel, etc.):</p> <p>This position is teleworking eligible, with expectations of a hybrid model that supports the needs of the office</p>		<input checked="" type="checkbox"/> Conflict of Interest Filing (Form 700) Required	<input type="checkbox"/> Requires Fingerprinting & Background Check	<input type="checkbox"/> May be Required to Work in Multiple Locations	<input type="checkbox"/> Other (<i>specify below in Description</i>)		
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3. DUTIES AND RESPONSIBILITIES OF POSITION							
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Percentage of Duties	Essential Functions						
30%	<p>Project Consultation and Portfolio Oversight Develop, implement and maintain an oversight framework that consists of monitoring the health of the CalHHS IT Project Portfolio. Develop, maintain and evolve a reporting structure that provides key project status, risks, and issues to CalHHS, OSI, and State Control Agency leadership. Perform analyses and impact assessments of project performance by working with the project teams, reviewing the Project Status reports, Independent Project Oversight Reports and the Independent Verification and Validation (IV&V) Reports in order to assess accurate project status and propose recommendations to AIO leadership of IT projects' risk and issue mitigation strategies, as appropriate.</p>						
30%	<p>Provide guidance and consultation to the project teams accordingly in identifying mitigation strategies to overcome project barriers and issues. Provide oversight to IV&V activities and serve as the escalation path</p>						

	for IV&V concerns in IT projects. Partner with California Department of Technology (CDT) in providing consultation to the CalHHS departments in navigating through the State IT Project Approval Lifecycle (PAL) and Stage Gate product development, review and approval. Responsible for the analysis, review and approval of project documents (PAL and active project documents such as Special Project Reports), by working with the Agency Enterprise Architecture, Information Security and CalHHS Interdepartmental Advisory Council.
25%	Portfolio and Governance Tools Develop, maintain and evolve automated tools in order to support portfolio oversight activities and to streamline reporting. Provide various ad-hoc reports to AIO management that reflects data to support portfolio analysis and recommendations. Maintain and understand the tool documentation in an effort to sustain the CalHHS Investment Approval Tracking (IAT). Provide recommendations as to how the IAT may be improved with the existing or a new toolset.
10%	Policy Analysis and Action Plans Evaluate the various policies released by the control agencies: CDT, Department of Finance (DOF) and the Department of General Services. Assess the potential impact to the CHHS Departments, the Agency and the AIO Office; provide recommendations for the response strategy of new policies (if needed) to ensure proper communication and compliance across all CalHHS Departments. Provide strategic guidance to the departments on all activities related to IT policy compliance. Ensure Project Stage Gate products and Special Project Reports submission align with the Budget Change Proposals prepared for submission to DOF, per appropriate year Budget Letters.
Percentage of Duties	Marginal Functions
5%	Perform other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply from the drop-down menus)*

Standing: Infrequent (7-12%)	Sitting: Frequent (51-75%)
Walking: Occasional (13-25%)	Temperature: Temperature Controlled Office Environment
Lighting: <i>Choose an item.</i>	Pushing/Pulling: Not Applicable
Lifting: Not Applicable	Bending/Stooping: 1-25%
Other:	
Type of Environment: a. Cubicle b. Select	
Interaction with Public: a. Required to assist customers on the phone and in person. b. Select c. Select.	

5. SUPERVISION

Supervision Exercised (e.g., Directly – 1 Information Technology Supervisor II; Indirectly – 5 Information Technology Associates)
None

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 Duty Statement and can perform the duties outlined above without a Reasonable Accommodation.

Employee's Name (Print)

Employee's Signature

Date

Supervisor's Statement:

I have reviewed the duties and responsibilities of this position and have provided a copy of the Duty Statement to the Employee.

Supervisor's Name (Print)

Supervisor's Signature	Date
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7. HRD USE ONLY

Human Resources Division Approval

<input checked="" type="checkbox"/> Duties meet class specification and allocation guidelines. <input type="checkbox"/> Exceptional allocation, 625 on file.	HR Analyst initials mg	Date approved 2/13/2018
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Reasonable Accommodation Unit use ONLY *(completed after appointment, if needed)*

* If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation form and submit to Human Resource Division (HRD), Reasonable Accommodation Coordinator.

List any Reasonable Accommodations Made:

- ** AFTER SIGNATURES ARE OBTAINED:**
- SEND THE ORIGINAL DUTY STATEMENT TO HRD TO FILE IN THE EMPLOYEE'S OFFICIAL PERSONNEL FILE (OPF)
 - PROVIDE A COPY TO THE EMPLOYEE
 - FILE A COPY IN THE SUPERVISOR'S DROP FILE

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