



POSITION DUTY STATEMENT

Division: Administrative Services Division	Classification Title: 1405 Information Technology Manager I
Branch: Business Technology Services Branch	Working Title: Portfolio Manager
Unit: Business Technology Services Branch	Tenure/Timebase: Permanent
Position City: Sacramento	Position County: Sacramento County
Position Number: 045-1405-001	CBID/Bargaining Unit: M01
Conflict of Interest Classification: Yes This position is designated under the Conflict of Interest Code. This position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment. Failure to comply with the Conflict of Interest Code requirements may void the appointment.	
Medical Evaluation: No	Bilingual Language:
Sensitive Position: No	DMV Employee Pull Notice: No
Fingerprint/Live Scan: Yes	Professional License: No
Work Week Group: E	Effective Date: 10/04/2023

Direction Statement and General Description of Duties: Under the general direction of the Agency Enterprise IT Portfolio Services (AEIPS) Chief, the Portfolio Manager serves as an expert advisor to provide project support services and oversight for the IT Project and IT services planning, development and implementation efforts for CalSTA departments. The incumbent will represent and ensure alignment with Agency's strategic initiatives, guiding principles, enterprise architecture guidelines, state policies, and industry best practices. The incumbent directs the most critical/complex projects where the consequences of error may have a serious detrimental effect on the operating efficiency of CalSTA departments.

The incumbent is responsible for using experience and knowledge to identify and inform key project processes and related critical success factors that can improve the probability of successful project



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implementations with a focus on the critical and complex projects and related activities across Agency. This includes developing and documenting key guidelines, information and associated toolkits that can be offered to projects in collaboration with representatives from other departments and disciplines. The incumbent is also responsible for driving and/or contributing to the development of defined and documented internal processes for use by our Enterprise IT Portfolio Services and other Transportation departments to evaluate projects, their progress and efficiency and the suitability of their project efforts and related artifacts.

Percentage and Essential/Marginal Functions:

35%	<p>Project & Portfolio Management (E)</p> <p>Serve as an Enterprise Portfolio and Project Manager. Plan, direct, organize, and control all work activities for critical enterprise projects and portfolio. Perform full range of project management activities including but not limited to, project integration management, procurement management, contract management, time management, scope management, schedule management, quality management, cost management, human resource management, risk management, and communications management.</p> <p>Work collaboratively with departments to understand proposed IT initiatives and to develop a flexible yet compliant planning strategy that reflects the criticality, complexity, and associated risks. Lead initial analysis of proposals and concepts using a standardized intake process, ensuring a comprehensive understanding of the business objectives and driving towards a solution that can meet required business and technical requirements. Understand and propose development strategies that will allow for the incremental delivery of business value, regardless of development methodology. Support cost estimation and resource identification/allocation strategies, procurement and vendor management strategies that will allow for effective product and project management. Understand opportunities for solution re-use and connect departments to others within CalSTA who have used similar solutions to deliver similar business value. Partner with the California Department of Technology's (CDT) Project Oversight and Approval function in providing consultation to the CalSTA departments in navigating through the State IT Project Approval Lifecycle (PAL) and Stage Gate product development, review, and approval. Contribute to statewide efforts to evolve and improve PAL planning documents and processes.</p>
30%	<p>Portfolio Oversight (E)</p> <p>Collaboratively develop, implement, and maintain an oversight framework to monitor the health of the CalSTA IT Project Portfolio. Evolve and implement a status reporting process that collects and presents project performance against key project metrics including those related to progress, delivery of business value, schedule compliance,</p>



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	<p>budget compliance, and procurement management. Prepare related reports and dashboards required by CalSTA, CDT, DOF, and other oversight organizations. Develop, deliver, maintain, and update related training materials and sessions to create a common and comprehensive understanding of CalSTA project oversight reporting requirements. Perform analyses and impact assessments of project performance by working with the department project teams, reviewing the Project Status Reports, Independent Project Oversight Reports and the Independent Verification and Validation (IV&V) Reports to assess accurate project status and propose recommendations to AIO of IT projects' risk and issue mitigation strategies. Provide guidance and consultation to the project teams accordingly in identifying mitigation strategies to overcome project barriers and issues.</p> <p>Provide oversight of CalSTA IT Governance policies and practices to ensure Agency-wide adherence to IT processes and standards. Perform IT Governance activities including: formulate and recommend of Governance policies, practices, processes, and procedures; implement and enforce IT Governance; and perform governance reviews and audits. Conduct technology operational performance analysis and report findings. Provide expertise and input in strategic and tactical planning activities associated with promoting IT direction.</p>
30%	<p>Policy Analysis, Portfolio Management Tools, and Documentation (E)</p> <p>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 CalSTA and the Transportation Departments; provide recommendations for the response strategy of new policies (if needed) to ensure proper communication and compliance across all Transportation 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.</p> <p>Develop, maintain, and evolve processes and related automated tools to support planning portfolio oversight activities and to streamline reporting. Analyze and process required project forms in support of department compliance. Maintain ongoing documentation regarding department project activities and related actions/decisions to ensure ongoing continuity. Coordinate project-specific reviews, presentations, and approvals with CalSTA directorate. Provide various ad-hoc reports to CalSTA management that reflects data to support portfolio analysis and recommendations. Support CalSTA enterprise portfolio governance and management efforts.</p>
5%	(M)



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The incumbent conducts analysis relative to IT trends and best practices in order to maintain operational readiness and to be continuously prepared for future technologies and operational capacity needs, utilizing inputs from staff, clients, peers and independent research in accordance with the direction of the AIO and applicable sections of the State Administrative Manual and Statewide Information Management Manual. Prepares a variety of informational and status reports pertaining to projects, work initiatives, recommendations and requests for approval among others. Prepares and delivers executive level presentations for internal and external audiences.

Supervision Received:

Supervision Exercised and Staff Numbers: This position oversees and manages IT staff responsible for delivering portfolio management and oversight of Agency's IT portfolio. The incumbent may also collaborate with multi-disciplinary teams drawn from the different Transportation Departments.

Physical Requirements: The incumbent may be required to sit for prolonged periods of time using a keyboard, monitor, mouse, and telephone. The incumbent must value cultural diversity and other individual differences in the workforce; adjust rapidly to new situations warranting attention and resolution; be open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles; consider and respond appropriately to the needs, feelings, and capabilities of others; be tactful and treat others with respect. In addition, the incumbent must have the ability to multi-task, adapt quickly to changing priorities, and perform completed staff work or tasks and projects with short notice. Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain confidentiality at all times.

Special Requirements: The incumbent must have knowledge of: Principles, practices, and trends of public administration, including management, organization, planning, cost/benefit analysis, budgeting, enterprise architecture, technology business management, portfolio and project management and evaluation; employee supervision, training, development and personnel management; current computer industry technology and practices; principles of data processing systems design, programming, operations, and controls; State level policies and procedures relating to Enterprise Data Processing, Security, and Information Technology; the department's goals, objectives, policies, and procedures; a manager's role in complying with the departments Equal Employment Opportunity policies and practices.

The incumbent must have the ability to: Develop and evaluate alternatives, make sound recommendations and decisions, and take appropriate action; establish and maintain priorities;



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effectively develop and use resources; identify the need for and assure the establishment of appropriate administrative procedures; plan, coordinate and direct the activities of a subordinate staff; make effective use of interdisciplinary teams; reason logically and creatively and use a variety of analytical techniques to resolve managerial problems; present ideas and information effectively, both orally and in writing; consult with and advise administrators and other interested parties on a variety of subject-matter areas, translating technical terms into everyday language; gain and maintain the confidence and cooperation of all levels in the organization; and effectively contribute to the department's equal employment opportunity objectives. Act tactfully in difficult situations; negotiate and resolve issues without confrontation; communicate effectively; make oral presentations at the appropriate level; act independently with flexibility and tact, and lead and motivate staff and team members.

The incumbent is responsible for extensive knowledge of IT policy, standards, processes and procedures, IT Industry best practices 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 will have a negative impact on the Agency's ability to process critical decision-support information and therefore the ability to deliver its transportation mission.

Personal Contacts: The incumbent interacts with IT executive leadership, staff of other State Agencies including State Control Agencies, staff from local governmental agencies and staff working in the private sector to coordinate and respond to inquiries related to Division operations. In performing the responsibilities of this position, the incumbent may have contact with other departments, governmental agencies or private companies concerning information technology and business management best practices. Must develop and maintain strong working relationships with others.

EMPLOYEE ACKNOWLEDGMENT

I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and the ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If you believe you may need to request reasonable accommodation to perform the duties of this position, discuss your request with your manager/supervisor who will engage with you in the interactive process.)

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

MANAGER/SUPERVISOR ACKNOWLEDGMENT



DEPARTMENT OF MOTOR VEHICLES

045-1405-001

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I certify this duty statement represents a current and accurate description of the essential functions of the position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement

MANAGER/SUPERVISOR NAME	MANAGER/SUPERVISOR SIGNATURE	DATE