



Governor's Office of
Planning and Research

DUTY STATEMENT

PROGRAM CALIFORNIA VOLUNTEERS		POSITION NUMBER (Agency – Unit – Class – Serial) 368-655-1414-xxx				
BRANCH Digital Infrastructure		CLASSIFICATION TITLE Information Technology Specialist II				
SECTION/UNIT (If applicable) N/A		WORKING TITLE CRM Application Owner				
REGIONAL HUB Sacramento		COI Yes	WWG E	CBID R01	TENURE P	TIME BASE FT
WORK SCHEDULE M-F 8am-5pm	SUPERVISION EXERCISED None	SPECIFIC LOCATION ASSIGNED TO 1400 10th Street, Sacramento, CA 95814				
INCUMBENT (If known)		EFFECTIVE DATE				
PRIMARY DOMAIN (IT positions only)	N/A					

AGENCY OVERVIEW

The Office of Planning and Research (OPR) serves the Governor and his Cabinet as staff for long-range planning and research and constitutes the comprehensive state planning agency. OPR assists the Governor and the Administration in planning, research, policy development, and legislative analysis. OPR formulates long-range state goals and policies to address land use, climate change, population growth and distribution, urban expansion, infrastructure development, groundwater sustainability and drought response, and resource protection. OPR's budget programs include State Planning and Policy Development, Strategic Growth Council, California Volunteers, Office of Community Partnership and Strategic Communication, Racial Equity Commission, and Youth Empowerment Commission. OPR is a fast-paced, creative work environment that requires staff to have strong collaboration skills, an ability to quickly respond to changing policy needs, and a positive attitude and sense of humor. Proven commitment to creating a work environment that celebrates diverse backgrounds, cultures, and personal experiences.

GENERAL STATEMENT

Under the general direction of the Director of Digital Design and Delivery, the CRM Application Owner (Information Technology Specialist II) is responsible for the overall management, development, and maintenance of the cloud-based customer relationship management (CRM) platform, Salesforce. The CRM Application Owner serves as the primary point of contact between the CV team, users, the CRM Platform Engineer and development team to manage five unique applications integrated within the CRM platform. The CRM Application Owner is responsible for setting the application's strategic direction and leads various projects related to Salesforce implementation, customization, and enhancement, driving efficiency across California Volunteers.

% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use addition sheet if necessary)</i>
ESSENTIAL FUNCTIONS	
30%	Manages and administers the Salesforce CRM platform, including its configuration, customization, and ongoing maintenance. Oversees the customization and development of Salesforce solutions and manages five unique applications (VH1, AmeriCorps, Alumni Network, Golden Volunteer, FormAssembly) integrated within the platform. Conducts regular system audits and health checks

	through dashboards to assess the overall performance and stability of the Salesforce platform. Collaborates with the CRM Platform Engineer to lead the design and architecture of Salesforce solutions, and tests, implements enhancements, and performance improvements, in advance of moving applications into production. Works closely with the DIO Director and provides strategic direction and guidance regarding Salesforce, and ensures that projects are aligned with goals and objectives.
25%	Leads Salesforce implementation projects from initiation to completion. Collaborates with the Program and DIO teams and develops project plans with project timelines, budget, schedule and scope, and serves as the main point of contact throughout the project life cycle. Facilitates communication and collaboration between all CV team members, ensuring alignment with project goals and priorities, as it relates to Salesforce and its applications.
20%	Develops and implements data policy, standards, and procedures to ensure the integrity of Salesforce data. Extracts, transforms and loads large data files from external sources using native or add-on SaaS tools to Salesforce. Establishes and maintains data quality metrics as it relates to user contacts and accounts. Works in collaboration with the CRM Platform Engineer to conduct risk assessments to identify compliance gaps and makes recommendations to data security solutions.
10%	Manages internal ticketing system for new IT requests and works with users to understand requirements. Provides training and support to users on Salesforce functionality and features and facilitates user feedback. Creates and maintains an internal technical documentation library with user guides on system use. Documents and communicates new feature updates through email communications and/or job aids.
10%	Hosts biweekly staff meetings to help improve overall DIO business processes and workflows. Participates in staff meetings, work events, attends trainings, provides work status reports, handles special projects, serves on inter-agency working groups. Leads and mentors DIO project teams fostering a culture of collaboration, continuous learning and innovation. Attends Salesforce conferences, and stays updated on new releases, features and updates to Salesforce.
	MARGINAL FUNCTIONS
5%	Other duties as required.
	KNOWLEDGE AND ABILITIES <i>Knowledge of:</i> Emerging technologies and their applications to business processes; business or systems process analysis, design, testing, and implementation techniques; techniques for assessing skills and education needs to support training, planning and development; business continuity and technology recovery principles and processes; principles and practices related to the design and implementation of information technology systems; information technology systems and data auditing; the department's security and risk management policies, requirements, and acceptable level of risk; application and implementation of information systems to meet organizational requirements; project management lifecycle including the State of California project management standards, methodologies, tools, and processes; software quality assurance and quality control principles, methods, tools, and techniques; research and information technology best practice methods and processes to identify current and emerging trends in technology and risk management processes; and state and federal privacy laws, policies, and standards. <i>Ability to:</i> Recognize and apply technology trends and industry best practices; assess training needs related to the application of technology; interpret audit findings and results; implement information assurance principles and organizational requirements to protect confidentiality, integrity, availability, authenticity, and non-repudiation of information and data; apply principles and methods for planning

or managing the implementation, update, or integration of information systems components; apply the principles, methods, techniques, and tools for developing scheduling, coordinating, and managing projects and resources, including integration, scope, time, cost, quality, human resources, communications, and risk and procurement management; monitor and evaluate the effectiveness of the applied change management activities; keep informed on technology trends and industry best practices and recommend appropriate solutions; foster a team environment through leadership and conflict management; effectively negotiate with project stakeholders, suppliers, or sponsors to achieve project objectives; and analyze the effectiveness of the backup and recovery of data, programs, and services.

DESIRABLE QUALIFICATIONS:

- Experience as a Salesforce Administrator, Consultant, Business Analyst, or equivalent.
- Proven ability managing Salesforce implementation projects and with a proven track record of successful project delivery.
- Experience managing project scope, budget, schedule, and resources.
- Understanding of CRM principles, processes, and operations.
- Proficient in Salesforce configuration, customization and development.
- General knowledge of VH1, AmeriCorps, Alumni Network, Golden Volunteer, FormAssembly, or integration technologies.
- Experience with data management within Salesforce.
- Excellent communication (both written and verbal), interpersonal, and leadership skills with the ability to collaborate effectively across teams and influence others at all levels.

SPECIAL PERSONAL REQUIREMENTS:

SPECIAL PHYSICAL CHARACTERISTICS: Persons appointed to this position must be reasonably expected to exert up to 10 lbs. of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Involves sitting most of the time but may involve walking or standing for brief periods of time. Occasional travel up to 10% may be required.

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.

SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE AND HAVE PROVIDED A COPY OF THE DUTY STATEMENT TO THE EMPLOYEE.

SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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EMPLOYEE'S STATEMENT: I HAVE READ AND UNDERSTAND THE DUTIES LISTED ABOVE AND CAN PERFORM THESE DUTIES WITH OR WITHOUT REASONABLE ACCOMMODATION. (IF YOU BELIEVE REASONABLE ACCOMMODATION IS NECESSARY, DISCUSS YOUR CONCERNS WITH YOUR HIRING SUPERVISOR. IF UNSURE OF A NEED FOR REASONABLE ACCOMMODATION, INFORM YOUR HIRING SUPERVISOR, WHO WILL DISCUSS YOUR CONCERNS WITH HUMAN RESOURCES OFFICE).

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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