

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Information Technology Specialist I	OFFICE/BRANCH/SECTION PBMD/Business Analysis Unit/ Project Management Section	
WORKING TITLE IT Business Analyst	POSITION NUMBER 900-170-1402-052	REVISION DATE 09/04/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

The Department of Transportation (Caltrans), Information Technology (IT) Project Management Section, Business Analysis Unit (BAU) staff are primarily responsible for developing documentation and processing IT projects through the California Department of Technology (CDT) Project Approval Lifecycle (PAL). The BAU staff conduct business analysis with project stakeholders and IT system owners; participate in efforts to resolve any system issues; are active in the IT project life cycle including requirements analysis, alternatives analysis, market research, cost benefit analysis, and finally, assist with the development of IT system solutions.

Under the direction of the Information Technology Supervisor II (Supervisor), the employee functions as an IT business analyst for IT projects within the Caltrans IT project portfolio. This work entails a variety of complex and analytical tasks relative to business analysis, including all stages of the PAL as defined in the State Information Management Manual (SIMM). The employee will prepare requirements matrices, system specifications and recommendations related to technical solutions. The employee will analyze, review, and prepare documentation of policies, compliance and procedures as outlined in the California Project Management Framework (CA-PMF), State Administrative Manual (SAM), and SIMM.

Domains:
Business Technology Management
Information Technology Project Management

CORE COMPETENCIES:

As an Information Technology Specialist I, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Innovation)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - Innovation)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Employee Excellence - Innovation)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Innovation)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Innovation)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Employee Excellence - Innovation)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Employee Excellence - Innovation)

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TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
50%	E	Within the scope of an IT project, the BAU analyst performs the analytical work of documenting Caltrans business areas using models, diagrams, flow charts, fit-gap analysis (AS IS and TO BE), requirements elicitation, alternatives analysis, and other essential IT project documents. Work with subject matter experts and project stakeholders to define solutions to technical problems from a business point of view. Document all feedback from customers and business programs regarding complex and sensitive business issues in the Caltrans business areas. Identify service areas or systems that need improvement and collaborate with team members to deliver recommendations. Assess organizational readiness for IT projects and serve as a change agent to ensure the solution is accepted by stakeholders. Validate requirements and ensure they are complete and perform requirements traceability throughout the project life cycle. At project conclusion, the employee will contribute to lessons learned at post-project evaluation.
30%	E	Participate in peer review of IT project deliverables and provide project management duties and guidance as needed. Present, in partnership with program and IT subject matter experts, project concepts and alternative analysis to the Enterprise Architecture Committee. Assist the Software Quality Management (SQM) unit with the development of test plans, scripts, test cases, and acceptance testing. Collaborate with other functional areas of the Caltrans' IT organization for IT project delivery. Communicate with internal/external stakeholders and document project meetings and workshops with meeting notes and/or minutes.
15%	E	Responsible for the creation of Project Management deliverables and coordinating activities of IT, business program, and contractors. Provide regular status reports to management on all assignments, including projects, issues, risks, costs, and new IT efforts that impact customers. Respond to management requests regarding IT project details. Participate in IT project status meetings.
5%	M	Complete or finalize PIER documentation with an emphasis on aggregating project cost data.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

The incumbent has no direct supervisory responsibilities. However, this position may require the incumbent to lead small to midsize teams to achieve common goals and objectives.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of information technology governance principles and guidelines to support decision making; complex and mission critical business processes and systems. The incumbent must have knowledge of principles, methods and procedures for designing, developing, optimizing, and integrating systems in accordance with best practices; system specifications design, documentation, and implementation methodologies and techniques.

The incumbent must have knowledge of the principles and practices of business analysis. Good interpersonal skills are required in order to work with customers using innovative and proactive techniques in eliciting business requirements. The incumbent must have strong customer service skills, be familiar with the principles of project management; in addition, the employee will know the PAL process. The incumbent will be required to maintain knowledge of the IT Projects or project concepts in progress and under development as well as working knowledge of the mission and high-level core activities of each of the Caltrans programs.

The incumbent must have the ability to formulate and recommend policies and procedures; perform effectively in a fast-paced environment with constantly changing priorities and establish and maintain project priorities. The incumbent will apply federal, state, department, and organizational policies and procedures to state information technology operations; apply systems life cycle management concepts used to plan, develop, implement, operate, and maintain information systems; positively influence others to achieve results that are in the best interests of the organization. The incumbent must consider the business implications of technology to the current and future business environment; communicate change impacts and change activities through various methods; conduct end-user training; collaborate closely with technical subject matter experts such as database administrators, network engineers, and server administrators to ensure systems are secure and meet compliance requirements. The incumbent must have situational awareness to determine the importance, urgency, and risks to the project and the organization; make decisions which are timely and in the best interests of the organization; provide quality and timely ad hoc project information to executives, project team members, and stakeholders. Finally, the incumbent will develop decision making documents; and security products will meet the business needs.

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The incumbent must have the ability to analyze information to determine business problems and processes in a level of detail necessary for a solution team to identify and implement solutions. The incumbent must have the ability to write clearly and concisely, document problem details, and current business procedures and process flows; analyze situations; reason logically and creatively, identify problems, draw valid conclusions, and develop effective solutions. The incumbent must establish and maintain cooperative working relationships with those contacted in the course of work; speak and write effectively; prepare effective reports, and communicate difficult/sensitive information tactfully; provide strong customer support for Caltrans' business programs; maintain a courteous and professional demeanor at all times while handling and prioritizing multiple tasks. The incumbent must communicate and work productively with supervisors and managers, technical staff, vendors, and customers in a professional consulting role; establish and maintain effective working relationships and provide excellent customer service. The incumbent must be able to act independently, exhibit open-mindedness, flexibility, diplomacy and tact. The incumbent must demonstrate sound work ethics, reliability and dependability; demonstrate effective decision-making skills in managing workloads; establish and maintain priorities, follow through and meet deadlines. Finally the incumbent must be able to facilitate and moderate meetings or workshops.

The incumbent must have a level of analytical ability sufficient to permit the employee to effectively apply current IT Project Management and Business Analysis techniques to the operational problems encountered by the Department.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must exercise good judgment, analyze problems, and take appropriate action. Poor decisions or recommendations could result in significant losses of Caltrans efficiencies through unnecessary delays, lost productivity, and user dissatisfaction.

PUBLIC AND INTERNAL CONTACTS

The incumbent works with client personnel outside of the Information Technology organization. This will include all levels of management and staff within Caltrans and those external agencies, private companies and consultants. In performing the responsibilities of this position, the representative may initiate contact with other departments, governmental agencies or private companies concerning IT solutions, technologies, and methodologies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard, video display terminal and telephone and may be required to lift and move supplies and equipment from one location to another. The incumbent must be able to walk between multiple State buildings and have a thorough knowledge of Caltrans building locations. This is a fast-paced job with a lot of deadlines. Thus, the incumbent in this position will be required to multi-task, be open to change, adapt to changes in priorities and policies, and to complete tasks or projects with short notice. The incumbent must be able to sustain mental activity needed for problem solving which includes reading, writing, analyzing, understanding, interpreting, consulting, developing alternatives, drawing sound conclusions, and recommending, implementing and evaluating solutions. The incumbent must be able to exercise sufficient control over emotions to gain and maintain the confidence and respect of others, recognizing and acknowledging emotionally charged issues or problems and responding appropriately to them.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

If not working remotely, the employee will work in a climate-controlled office under artificial lighting using a personal computer. The employee may be required to work for extended periods of time in a computer room that maintains an approximate temperature of 70 degrees.

The employee may be required to travel. When available, a State vehicle will be provided. Possession of a valid driver's license is required when operating a State owned or leased vehicle. If the employee utilizes their own personal vehicle, they may be reimbursed for travel expenses.

Some weekend or after-hours may be required. The employee must carry a cell phone and respond to calls after hours.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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