

YOUR EFFORTS WILL MAKE FI\$Cal A SUCCESS

DUTY STATEMENT

CLASSIFICATION TITLE Information Technology Specialist II	DIVISION NAME Information Technology Division
WORKING TITLE Senior Project Manager/ALM Tool Administrator	OFFICE/SECTION/UNIT Project Management Office, Enhancements and Project Management Section
EMPLOYEE NAME VACANT	POSITION NUMBER 333-350-1414-024

You are a valued member of the Department of FISCAL. You are expected to work cooperatively with team members and others to provide the highest level of service possible. Your creativity and productivity is encouraged. Your efforts to treat others fairly, honestly and with respect are important to everyone who works with you.

GENERAL STATEMENT

Under general direction from the Information Technology Manager (ITM) I, the Information Technology Specialist II (ITS II) serves as a Senior Project Manager in the Enhancements and Project Management (EPM) Section within the Project Management Office (PMO). The incumbent is responsible for planning, executing, monitoring and controlling all activities for the assigned projects which include implementation of new IT products, services and systems and new releases of the FI\$Cal system. The ITS II ensures that FI\$Cal's project management processes, tools and techniques, specifically Application Lifecycle Management (ALM) tools, such as IBM Engineering Lifecycle Management (ELM), industry best practices and state processes including the California Project Management Framework (CA-PMF) are consistently applied to all assigned projects.

In addition, the ITS II communicates with business partners on updated state policies and procedures, and ensures that the department's control agencies' reporting requirements are met. The ITS II articulates and implements processes, facilitates discussions or meetings, and provides status updates, coaching and mentoring to other project team members.

The duties for this position are focused in the Information Technology Project Management domain, however, work may be assigned in the other domains as needed.

SUPERVISION RECEIVED

Incumbent receives direct supervision from the ITM I.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

The incumbent must be able to perform the essential functions with or without reasonable accommodation. Specific duties include, but are not limited to, the following:

<u>% OF TIME</u>	<u>ESSENTIAL FUNCTIONS</u>
40 %	Oversight of Enhancements & Projects and ALM Tool Management <ul style="list-style-type: none">• Collaborates with FI\$Cal managers and Partner (Department of General Services, Department Of Finance, State Controller's Office, and State Treasurer's Office) managers to plan and implement changes to various FI\$Cal subsystems such as PeopleSoft, Hyperion, and Business Intelligence subsystems.• Manages the FI\$Cal Enhancements and Project Portfolio by collaborating with FI\$Cal management, staff, consultants, and partner staff on analyzing, prioritizing, planning, and monitoring of the many enhancements to the FI\$Cal system.• Creates and executes Structured Query Language queries, and generates reports for PMO Management from multiple sources including, IBM CLM, Phire, ServiceNow.• Develops and maintains sophisticated documentation of software development life cycle (SDLC) processes and enhancement prioritization and lifecycle procedures, based on industry best practices.• Develops and provides periodic training for FI\$Cal staff and other teams on the enhancements lifecycle processes and standards.• Tracks and reports metrics associated with enhancement releases, including but not limited to; planned vs actual scope delivered, planned vs actual productivity of various activities, and quality metrics.• Designs and prepares reports for senior management
25 %	IT Project Management <ul style="list-style-type: none">• Works as a senior project manager with the project sponsor, PMO leadership and functional and technical managers of various FI\$Cal sections to plan scope, budget, schedule, and resource allocations for assigned projects.• Facilitates gathering and analysis of business requirements, system design, development, testing, integration, and implementation of products or services of the assigned projects.

	<ul style="list-style-type: none"> • Leads cross-functional matrix teams through all project phases and system development lifecycle phases to achieve the goals and objectives of assigned projects. • Execute, monitor and control project activities including corrective and/or preventive actions. • Proactively identifies project risks, develops risk response plans and coordinates their execution. • Schedules and leads project related meetings and discussions. • Secures required approvals on project documents. • Interprets and applies requirements, standards, and guidelines for IT Project management and reporting to ensure compliance with departmental and State of California IT policies and procedures. • Coordinates with the Project Management Office (PMO) and Divisions in preparing project reports required by internal and external stakeholders including the California Department of Technology (CDT) independent project oversight. • Maintains a high level of knowledge in IT project management concepts, methods, and best practices, including Project Management Body of Knowledge, State Information Management Manual (SIMM) and CA-PMF.
20 %	<p>Collaboration, Coordination and Business Outreach</p> <ul style="list-style-type: none"> • Provides consultation and guidance to IT staff and program staff on project management procedures and best practices. • Advises, consults and collaborates with other project managers and teams in guiding projects through from concept through implementation. • Manages business relationship with customers. • Identifies potential new customer initiatives by identifying the customer's business problem or opportunity and collaborating with senior management to define high level scope, budget and schedule estimates. • Implements the elements of strategic initiatives and develops recommendations for improvement. • Works with matrix teams, managers, and program leads to recommend and implement IT projects that support the departmental performance objectives. • Delivers presentations both verbally and in writing to staff, customers, external stakeholders (including other agencies), and management of all levels within the department. • Coordinates and facilitates EP meetings.

10 %	Project Documentation <ul style="list-style-type: none"> • Prepares information for monthly Project Status Report (PSR), mitigation plans for project risks, action plans for project issues, and a variety of other documentation and reports, as needed. • Responsible for the development and maintenance of all project artifacts and documentation throughout the project lifecycle, including but not limited to, concept statements, charters, Work Breakdown Structures (WBS), project plans, resource plans, project schedules, communication plans, issue logs, change logs, risk assessments, risk management plans, contract management plans, and other documentation as required. • Prepares other reports as needed.
% OF TIME	MARGINAL FUNCTIONS
5%	<ul style="list-style-type: none"> • Perform other related duties as required to fulfill FI\$Cal's mission, goals and objectives. Additional duties may include, but are not limited to, assisting where needed within the team/unit, which may include special assignments.

KNOWLEDGE AND ABILITIES

All knowledge and abilities of the Information Technology Specialist I classification; and

Knowledge of: 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.

Ability to: 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.

SPECIAL REQUIREMENTS

The incumbent will use tact and interpersonal skills to develop constructive and cooperative, working relationships with others, e.g., stakeholders, customers, management, peers, etc., to facilitate communication to improve the work environment and increase productivity. **Fingerprinting and background check are required.**

WORKING CONDITIONS

The incumbent may need to be on-site to carry out their duties. This position requires the ability to work under pressure to meet deadlines and may require excess hours to be worked. The incumbent should be available to travel as needed and is expected to perform functions and duties under the guidance of the Department of FISCal's core values. The incumbent provides back-up, as necessary, to ensure continuity of departmental activities.

This position requires prolonged sitting in an office-setting environment with the use of a telephone and personal computer. This position requires daily use of a copier, telephone, computer and general office equipment, as needed. This position may require the use of a hand-cart to transport documents and/or equipment over 20 pounds (i.e., laptop, computer, projector, reference manuals, solicitation documents, etc.). The incumbent must demonstrate a commitment to maintain a working environment free from discrimination and sexual harassment. The incumbent must maintain regular, consistent, predictable attendance, maintain good working habits and adhere to all policies and procedures.

SIGNATURES

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the assigned HR analyst.)

Employee Signature

Date

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Hiring Manager Signature

Date

HR Analyst AR

Date Revised: 12/30/2025