

PROPOSED  
**Department of Health Care Access and Information**  
**Duty Statement**

<b>Employee Name</b> Vacant	<b>Organization</b> Office of Information Services Planning and Management Branch Project Planning Section	
<b>Position Number</b> 441-179-1414-XXX	<b>Location</b> Sacramento	<b>Telework Option</b> Hybrid
<b>Classification</b> Information Technology Specialist II	<b>Working Title</b> Portfolio Officer	

**General Description**

Under direction, incumbents may perform a wide variety of tasks requiring regular, innovative problem solving within broadly stated and non-specific guidelines. The scope typically includes multiple program areas and involves planning, developing and implementing technological solutions that are essential to the missions of the overall organization or affect large numbers of people on a long-term or continuous basis in the Information Technology Project Management and Business Technology Management domains.

Incumbent performs the following tasks:

- Monitor or track project milestones and deliverables to ensure that the project deliverables are on time, within budget and at the required level of quality.
- Apply industry standards, principles, methods, and techniques to manage a project through all phases of the Project Management and System Development Life Cycles.
- Create a detailed work plan which identifies and sequences the activities needed to successfully complete the project.
- Define the scope of the project in collaboration with senior management.
- Develop a schedule for project completion that effectively allocates the resources to the activities.
- Develop and sustain cooperative working relationships with project stakeholders through all project phases.
- Develop time and cost estimates and capture actual data for analysis and management.
- Document lessons learned and Post Implementation Evaluation Reports.
- Evaluate, monitor, and ensure compliance with laws, regulations, policies, standards, or procedures.
- Keep abreast of changes in industry practices, technology trends, and emerging technology trends by reviewing current literature, talking with colleagues, participating in educational programs, attending meetings or workshops, or participating in professional organizations or conferences.
- Lead and/or direct the documentation of business processes or operational activities.
- Manage or oversee all aspects of one or more projects, including people, resources, and schedules.
- Manage single or multiple projects ranging in complexity based on business and technical factors.

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- Meet regularly with the project team (state and vendor), project sponsor, project steering committee, governance, directorate, control agencies, and other external stakeholders to review project progress, discuss outstanding project issues and mitigation strategies, and communicate upcoming project activities.
- Monitor the progress of the project and make adjustments as necessary to ensure the successful completion of the project.
- Prepare project status reports by collecting, analyzing, and summarizing information and trends.
- Review the quality of the work completed with the project team on a regular basis to ensure that it meets the project standards.
- Formulate business cases, feasibility studies and research analysis reports related to technology endeavors.
- Provide IT consultation to business community to support business programs.
- Coordinate and consult with users, administrators, and engineers to identify business and technical requirements for proposed system modifications or technology requirements.

The incumbent serves as Portfolio Officer for the Portfolio Planning Section (PPS). The incumbent is responsible for the coordination of PPS operations and helps coordinate functions and activities between the Department's Offices. The incumbent coordinates Section operations to ensure its goals are being met, stakeholders' needs are being addressed, and operations align with Department and OIS strategies. The incumbent coordinates the HCAI Enterprise Architecture program and the Enterprise Architecture Board and works closely with the HCAI Technical Architect and Solutions Architect in planning, design, development, and implementation of technology solutions. The incumbent will also act as expert project manager and senior business analyst to mentor junior staff in these areas; and assist the PPS manager develop and maintain tools and documentation, following the guidelines set forth by the Project Management Institute and the California Department of Technology.

The incumbent is also responsible for PPS patterns practices for portfolio management, agile product management, business analysis, service design, user experience, and user-centered design. The incumbent oversees the patterns and practices center of excellence and community of practice for these practices.

The incumbent serves as project manager on critical and strategic technology and program projects to address department priorities, overseeing all aspects of the project lifecycle and helping to ensure project success and business outcome delivery. The incumbent performs business analysis activities to support project and portfolio success.

The incumbent will demonstrate knowledge of portfolio management and planning, program operations and administration, application development life cycle, complex system design and general IT practices and procedures.

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<b>Supervision Received</b>	Under direction, incumbent reports to the Information Technology Manager I of the Project Planning Section (PPS), in the Planning and Management Branch (PMB).
<b>Physical Demands</b>	Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation.
<b>Typical Working Conditions</b>	Requires use of computing devices and phones, frequent face-to-face contact with management, staff, consultants and the public, verbal, written and digital (e-mail) communication, extensive review, analysis and preparation of electronic and written documents, assessment of practical demonstrations, mobility to various areas of the Department, occasional travel and overnight stays to training/conferences or the Los Angeles field office may also be required, and work hours may deviate from core business hours based on the service requirements of the Department.

**Job Duties**

**E = Essential, M = Marginal**

30% E

**Portfolio Officer (Branch Liaison)**

Serve as a strategic operating liaison between the Policy and Planning Group and the Acquisitions and Management Services Group, under the Planning and Management Branch. Coordinate Branch operations to ensure Branch goals are being met, stakeholders' needs are being addressed, and operations align with OSHPD and ISD strategies. Identify, provide recommendations, and execute initiatives to improve Branch collaboration, organizational performance, and processes. Collaborate with Branch and ISD management to ensure budget, priority procurements, and priority hires are aligned to department portfolio goals and projects. Participate in planning to ensure effective Branch communication activities to OIS and HCAI stakeholders, managers, and staff. Participate in planning, coordination, and administration of the division budget, priority procurements, and priority hires. Lead Branch strategic and operational planning and portfolio goal planning activities. Coordinate the HCAI Enterprise Architecture program and the Enterprise Architecture Board. Develop roadmaps for to-be architectures that provide alternative implementation paths, which include measurable outcomes, time-bound milestones, and proposed costs. Support a business architecture that drives measurable outcomes supported by the HCAI enterprise architecture environment. Conduct research, develop proposals, and implement strategies to align Office operations. All under general direction of the PPS Manager.

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25%	E	<p><b>Patterns and Practices Coach</b></p> <p>Collaborate with the PPS experts to coach, mentor, and train PPS and the Department staff with patterns and practices for portfolio management, agile product management, business analysis, service design, user experience, and user-centered design, in collaboration with the other Officesr. Maintain the Planning and Management Branch as a center of excellence for these practices. Monitor, shadow, and participate in project team meetings. Develop standards, templates, tool, and other resources to implement these practices. Lead communities of practice to extend and inculcate these practices across HCAI programs. Conduct research, develop proposals, and implement strategies to implement patterns and practices. All under general direction of the PPS Manager.</p>
25%	E	<p><b>Strategic Project Management</b></p> <p>Serve as the Project Director in support of the most complex strategic, enterprise, and operational IT and program projects. Create and maintain project management plans for the most complex and strategic IT and program projects. Coordinate the project activities of project teams including the business teams, technical teams and supporting contractor teams for the most complex and strategic IT and program projects. Maintain project schedules, monitor and coordinate all cross-team activities and dependencies. Track, measure, and report on project costs, schedule, and scope. Under general supervision, review and communicate status and future actions with project team, vendors, management, and internal stakeholders. Coordinate the review and acceptance of project deliverables, and implement action plans to correct any unaccepted deliverables. Participate and support efforts to negotiate, implement and monitor corrective action plans to keep the project on schedule, within budget, and in line with project scope and objectives.</p> <p>Under general supervision, develop and deliver final reports documenting the IT project implementation results and lessons learned to the project sponsor, program stakeholders, OIS stakeholders, and the Chief Information Officer (CIO) for the most complex and strategic IT and program projects. At project closure, logically organize all project documentation for future reference and project audits, as appropriate.</p>
15%	E	<p><b>Customer and Stakeholder Relationship Management</b></p> <p>Establish and maintain positive relationships with division management, staff, and other key stakeholders. Under general supervision, resolve critical and the most complex issues with customers and stakeholders in assigned programs and/or division(s). Provide effective communications with division stakeholders and across the enterprise in order to promote consistency, transparency, and a unified message, which conforms to HCAI values. Participate in and support efforts to develop and communicate enterprise-wide IT methodologies and standards.</p>
5%	M	<p>Perform other related duties as required.</p>

**Other Expectations**

- Demonstrate a commitment to performing duties in a service-oriented manner.

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- Demonstrate a commitment to building an inclusive work environment that promotes HCAI's diversity, equity and belonging where employees are appreciated and comfortable as their authentic selves.
- Demonstrate a commitment to maintaining a work environment free from workplace violence, discrimination, and sexual harassment.
- Demonstrate a commitment to HCAI's Mission, Vision, and Goals.
- Demonstrate a commitment to HCAI's Core Values and Guiding Principles.
- Maintain good work habits and adhere to all HCAI policies and procedures.

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**To Be Signed by the Employee and Immediate Supervisor**

I have read and understand the duties and expectations of this position

I have discussed the duties and expectations of this position with the employee.

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Employee Signature/Date

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Supervisor Signature/Date