

ESSENTIAL FUNCTION DUTY STATEMENT

HRM-025

Classification Title: Information Technology Specialist I	Branch/Division/Bureau: ALSB / ITD / BTMB
Working Title: Lead IT Procurement Specialist	Office/Unit/Section/Geographic Location: Procurement and Contracts Administration/ Sacramento
Position Number (13 Digit): 413-106-1402-901	Conflict of Interest Position: ☐ NO ☒ YES
Employee Name:	Effective Date:

BASIC FUNCTION:

Under direction from an Information Technology (IT) Supervisor II, the IT Specialist I acts as the lead procurement official by coordinating and controlling all aspects of complex information technology and telecommunications acquisitions of goods and services through purchase, rental, lease, and service contracts. They assist the Business Technology Management Bureau (BTMB) Chief in developing, auditing, and training of the IT Procurement Policies and Procedures. They independently develop reports and conduct analysis of procurement activities. The incumbent has responsibility within the California Department of Insurance (CDI) to provide a variety of IT activities to lead the procurement process for IT acquisitions.

Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)

This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Statement of Economic Interest (Form 700), which includes an Assuming Office filing within 30 days of appointment, annual filings, and a Leaving Office filing within 30 days of physical separation. Non-compliance with the Conflict of Interest Code requirements may result in the voiding of appointment, financial penalties, or enforcement actions.

ESSENTIAL FUNCTIONS**35% Information Technology Procurement Preparation**

Leads and facilitates the procurement process for complex IT acquisitions by developing solicitation documents and bid specifications for IT and telecommunications (telecom) acquisitions. Reviews and validates technical, contractual, and administrative requirements in accordance with the Department of General Services (DGS) Procurement Division (PD), the California Department of Technology (CDT) policies, the State Administrative Manual (SAM), the State Information Management Manual (SIMM), the State Contracting Manual (SCM), Public Contract Codes (PCC), Government Codes and Regulations, Uniform Commercial Code (UCC), Management Memos, Executive Orders, etc.

35% Information Technology Procurement Management

Serves as an advanced technical specialist and consults with suppliers and with the suppliers' technical experts on the purpose for specific requirements and the various

ESSENTIAL FUNCTION DUTY STATEMENTHRM-025

solicitation steps including: submission of compliant bids, evaluation criteria, award methods, and protest procedures. Participates, in conjunction with the BTMB Chief, to evaluate and negotiate solicitation and contract language changes for the State and contractors by determining if contract change proposals submitted by competing suppliers should be made with concurrence from the Department's legal counsel.

Determines the proposed awardee(s) by evaluating bid or offer submittals based on requirements of the solicitation that includes reviewing bid or offer costs, specification compliance, delivery terms, brand and models offered, recycle content, etc. and makes recommendation to the BTMB Chief for contract award. Documents decisions through detailed checklists, worksheets, and/or other evaluation and selection methods, as appropriate. Communicates with CDI requestors, Budget & Revenue Management Bureau, Accounting Services Bureau, and Business Management Bureau in order to effectively procure and manage CDI resources.

15% Information Technology Procurement Planning

Analyzes Department requests for special requirements specific to the product and/or service by reviewing the technical specifications for completeness and accuracy, administrative requirements, quantity, delivery terms, estimated costs, acceptance criteria, and supplier information. Performs market research efforts through the Request for Information process for large, reportable projects and works as a subject matter expert (SME) for IT procurement on these projects. Makes determinations based on research and detailed analysis on the best procurement vehicle and approach to use for each effort.

5% Purchase Order and Contract Amendments

Evaluates and processes amendment requests for purchase orders and contracts. Ensures that an amendment is allowed for in the original agreement and documents decisions through detailed checklists, worksheets, and/or other evaluation methods.

5% IT Procurement Policies and Procedures

Serves as departmental advanced technical expert in IT procurement and contracts, providing assistance and/or consultation to management and/or staff. Functions as the liaison for the purpose of providing clarification and direction of departmental policies and procedures using knowledge of contracting procedures, departmental policies and rules, etc. at the direction of management. Reviews communications concerning contract legislation and timeframes for new rules and regulations, and analyzes the impact to report changes to management to establish policy or guidelines for departmental use. Discusses with ITD technical staff pertinent facts and desired levels for established CDI standards and specifications, as well as, develops procedures and verification methods for product and/or service acquisitions. Leads procurement staff by providing training and guidance on procurement policy and procedures.

MARGINAL FUNCTIONS**5% Maintenance, Operations, and IT Procurement Special Projects**

Develops and/or recommends improved acquisition tools and techniques to enhance the IT and telecom acquisition process by conducting research on new systems and/or software capabilities and staying current with new technology features using internet tools and

ESSENTIAL FUNCTION DUTY STATEMENTHRM-025

discussions with suppliers. Assures continuous improvement of the IT and telecom acquisition process, completes special projects as assigned that may be administrative in nature as instructed by the BTMB Chief and in accordance with the policies and using the equipment already cited.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- Ability to work in a high-rise building.
- Ability to transport documents and/or equipment up to 15-20 lbs., i.e. laptop computers, files, reference manuals, solicitation documents, etc.
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed, however other authorized transit subsidies do exist for those who qualify.

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 Health & Safety Analyst.)

Employee Signature

Date

Printed Name

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

Supervisor Signature

Date

Printed Name