

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Information Technology Specialist II	OFFICE/BRANCH/SECTION Project and Portfolio Management Section	
WORKING TITLE Senior IT Business Analyst	POSITION NUMBER 900-170-1414-026	REVISION DATE 08/31/2026

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

GENERAL STATEMENT:

Under the general direction of the Information Technology Manager I, the incumbent will function as a lead business analyst for complex, sensitive and/or major projects undertaken by the Project and Portfolio Management Section (PPMS). The Department of Transportation (Department) Information Technology (IT) Enterprise Portfolio Management Services is responsible for the management and execution of all reportable and delegated projects with IT components in the Department. This responsibility requires the PPMS to define methodologies, standards, processes, and conduct activities for the enterprise portfolio which includes various deliverables such as Requirements Specifications, Project Approval LifeCycle (PAL) forms and artifacts, process flows and user stories.

Major Functions:

Work at this level requires many different and unrelated processes and methods applied to a broad range of activities or substantial depth of analysis. Incumbents demonstrate all the necessary qualities of effective project or function leadership and play a key role in the success in the department's use of IT and to the business as a whole. Incumbents also possess the general and technical competencies needed to train/mentor department IT staff and business customers in a complex technical area or process. Understand, facilitate and communicate changes to business processes to deliver desired value and goals to the business. Use industry standard methodologies to perform process analysis and to achieve project objectives. Assess organizational readiness for IT projects and serve as a change agent to ensure the solution is accepted by stakeholders. Apply IT Business Analysis industry standards, principles, methods, and techniques through all phases of the Project Management and System Development Life Cycles. Validate requirements to ensure they are specific, measurable, attainable, relevant, and time bound. Perform requirements traceability throughout the project life cycle including testing. At project conclusion, the incumbent will contribute to lessons learned at post-project evaluation.

DOMAIN(s):

Business Technology Management
IT Project Management

CORE COMPETENCIES:

As an Information Technology Specialist II, 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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (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 - Stewardship)
- **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 - Collaboration, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration)
- **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 - Collaboration)

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Innovation, Integrity)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
50%	E	Performs all aspects of business analysis for IT projects of any size or complexity, ensuring alignment with business needs. This includes gathering, documenting, and analyzing business, functional, and technical requirements. Collaborates with stakeholders, subject matter experts, and business units to ensure that requirements are comprehensive and reflect the organization's goals. Leads workshops, interviews, and other elicitation activities to map out current and future processes and develops business process models, use cases, and other necessary documentation. Identify the people, groups, or organizations that could impact or be impacted by the project. Analyze stakeholder expectations and their impact on the project. Develop appropriate strategies to effectively engage stakeholders in business process and requirements decisions. Ensures requirements traceability throughout the project lifecycle, linking them to business objectives and deliverables. Ensures compliance with the Project Approval Lifecycle (PAL) process to meet the state's regulatory requirements. Lead and perform research related to technology trends and best practices, using industry-standard methodologies to perform analysis, to support the Department of Transportation (DOT) and IT's strategic goals. Independently perform ad hoc research and analysis to address issues identified by management. Lead the implementation of strategic initiatives and continuous process improvement to support program efficiencies. Make recommendations to project managers to ensure optimal solutions are provided to customers. Communicate project status updates, issues, risks, and/or changes with management to assure that the program's business needs have been addressed. Collect and promote lessons learned across projects, System Development Lifecycle (SDLC) development, and reporting. Provide excellent customer service to programs and stakeholders to effectively and efficiently to deliver expected results.
25%	E	Perform all aspects of project management for small and medium size and complexity IT projects following Project Management Institute (PMI), California Department of Technology (CDT) and DOT standards and industry best practices, to ensure the project deliverables are on time, within budget and at the required level of quality. Facilitating communications and information exchange between external groups and the project team, Manage, monitor and control IT project budget, schedule, and scope ensuring development of quality solutions in support of business needs. Monitors and tracks project milestones and deliverables to ensure that the project deliverables are on time, within budget, and at the required level of quality. Host and facilitate daily project stand-up meetings. Manage risks using established risk management processes (risk management planning, risk identification, qualitative risk analysis, quantitative risk analysis, risk response planning, and risk monitoring and control). Work closely with other project managers on various size and complexity projects while learning and applying new project management skills, tools, techniques and best practices. Leads the preparation and submission of PAL stage documentation, including Stage 1 Business Analysis, Stage 2 Alternatives Analysis, Stage 3 Solution Analysis, and Stage 4 Project Readiness and Approval. This includes collaborating with cross-functional teams to ensure the accuracy and completeness of all PAL documentation. Tracks progress through the PAL stages, identifies risks, and ensures timely submission of documents, adhering to California Department of Technology (CDT) standards. Supports executive decision-making by providing data, reports, and analysis as needed to progress through the PAL.
20%	E	Provides operational support of the full Project Management and System Development Lifecycle (SDLC) including existing and evolving solutions for project library services, project control services, demand management, capacity management, and test management.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

5%	M	Train, mentor, or lead other Business Analyst staff in the use of State and industry best practices including the Business Analyst Body of Knowledge (BABOK), the California Project Management Framework (CAPMF) toolset, the IT PMO tool sets, SharePoint, and scheduling tools.
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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 teams and provide direction to IT Specialist I Business Analysts and Project Managers to achieve common goals and objectives.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The incumbent is required to have a broad knowledge of principles of the process for initiating, planning and executing IT projects, with a focus on business analysis and working with, project management, IT subject matter experts, and business program leads and sponsors to implement IT solutions. The incumbent must exercise a high degree of initiative, independence, and demonstrate tact and good judgment. The incumbent must be able to communicate effectively in order to develop and maintain effective and cooperative working relationships. The incumbent must have strong written and verbal skills to communicate issues and concerns. The incumbent must be able to adapt easily to changing priorities and maintain consistent attendance in the performance of these specific functions. The incumbent must possess a high degree of technical expertise to be operationally competent in a highly complex and sensitive function, developing and/or recommending processes, procedures, and methodologies for the approval of Department Management and will work closely with both internal and external staff at all levels.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Bad judgment and/or decisions may prevent the incumbent from effectively supporting the Department's IT projects. This may contribute to the cancellation of projects, schedule delays, cost overruns, technical issues, and products that do not fulfill all of a customer's requirements and expectations. Should this occur, the Department may lose credibility relative to its ability to track and manage its IT projects. This may lead to a further loss of funding for other current and future IT projects, along with an increase in schedule delays and project overhead costs due to increased Control Agency reporting, technical, financial, and project management requirements.

PUBLIC AND INTERNAL CONTACTS
The incumbent will be called upon to interface closely with program, technical and IT staff and management within the Department. In performing the responsibilities of this position, the incumbent may initiate contacts with other departments, have contact with Government and/or Control Agencies such as the Department of General Services or the Department of Technology Services; vendors of commercial tools that may be adopted by the Department; or outside consultants concerning successful project delivery.

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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 work may be required. The employee must carry a cell phone and respond to calls after hours.

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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