

Office of Enterprise Information Services  
Duty Statement

<b>Section:</b>	Enterprise Information Services
<b>Unit:</b>	Policy/Planning, Project Management and Acquisitions
<b>Position Number:</b>	065-620-1470-831
<b>Classification:</b>	Associate Information Systems Analyst (Specialist)
<b>Date:</b>	8/5/2016

**Supervision:** Under the general supervision of the Data Processing Manager III within Policy/Planning, Project Management and Acquisitions (PPPMA), the Associate Information Systems Analyst (Specialist) (AISA Spec.) will serve as a team member for the California Department of Correction and Rehabilitation (CDCR) information technology (IT) Financial Management, Resource Management, Project Management, Portfolio Management, and IT Governance related processes. At times, for specific PPPMA related initiatives, the AISA Spec. may also take direction from the Systems Software Specialist III (Technical) within PPPMA. The AISA Spec. will participate in the management and support of the Department's Financial, Portfolio Management and IT Governance policies, best practices, and processes – to ensure they align with various control agency requirements. The AISA Spec. will plan, design, and carry out assignments, given general direction by the manager.

**Knowledge:** The incumbent must possess general knowledge and proficiency regarding each of the PPPMA areas of responsibility – financial and portfolio management, as well as IT Governance best practices. The AISA Spec. must also have knowledge of IT concepts, practices, methods, and principles, with emphasis on those statewide IT polices, instructions, and guidelines administered by the California Technology Agency. In addition, the incumbent should possess knowledge and a general understanding of the phases of the Project Management industry trends, best practices, and standards. To be successful in this position, the incumbent must have the knowledge and ability to analyze information and situations; identify and solve problems; develop solutions; and communicate effectively and establish effective working relationships. The incumbent will apply this knowledge to IT projects, initiatives, maintenance, and operations. The incumbent will impart this knowledge to project managers, managers, chiefs, and any/all CDCR staffs who desire to effectively practice portfolio and financial management principles. The incumbent must possess knowledge of the CDCR mission and business functions in order to take into account the larger business perspective.

**Guidelines:** The AISA Spec. must interpret and apply requirements, standards, and guidelines for IT Portfolio and Financial Management reporting across the organization. Additionally, the incumbent will be responsible for developing, implementing, and maintaining policies, processes, and procedures in support of California Technology Agency requirements and generally accepted best practices for all PPPMA areas of responsibility.

**Complexity:** The AISA Spec. will work at the journey level. The position will require continuing efforts to establish concepts, theories, or programs. The incumbent will be required to train/mentor Enterprise Information Services (EIS) staff, management, and customers in the use of Portfolio and Financial Management processes and methodologies. Additionally, the incumbent will work closely with the Department's major stakeholders to align the IT.

**Scope and Effect:** The AISA Spec. will participate in IT Financial and Portfolio Management consulting where the implementation of advice or plans will have a significant impact on the organization's business success. The scope of work affects IT projects and EIS programs and the prioritization and management of all IT resources required to achieve the primary mission of CDCR. The systems developed via these projects and EIS programs are deployed to thousands of State and local law enforcement personnel and provide data necessary for officer and public safety. They are also deployed to ensure the safe and secure housing of all the Department's inmates and wards and the safe and effective working environment of its staff.

**Personal Contact:** The AISA Spec. will consult with or advise management, administrative, and executive staff on the planning, development, implementation, and coordination of IT issues. The incumbent will frequently contact program area staff, management, and executive management

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to provide oversight and adherence for portfolio and financial management deliverables. The incumbent will communicate effectively, both verbally and in writing, at the Control Agency, Department, and Division levels. At this level, the incumbent will well organized and communicate effectively, verbally and in written form, with peers within the CDCR as well as with external entities. The incumbent will write status reports, financial reports, and review products produced by IT staff throughout the Department at levels from line staff to CDCR executive management. The incumbent will also give verbal presentations to customers and briefings to EIS and CDCR management.

**Purpose of Contacts:** In the normal course of work, the incumbent will be expected to justify, defend, negotiate, and settle matters involving significant or controversial issues, communicating at the Control Agency, Department, and Division levels.

Specific duties include, but are not limited to:

45%	Financial Management IT Coordinator	<ul style="list-style-type: none"><li>• Prepare, coordinate, and facilitate the preparation of EIS programs and IT projects financial management documentation.</li><li>• Plan, manage, monitor, and track EIS programs and IT projects, financial plans, and prepare required monthly financial reports.</li><li>• Research and resolve budget and fiscal disputes.</li><li>• Develop, lead, and participate in the development and writing of various internal and external financial management reports.</li><li>• Prepare and/or monitor status reports to ensure program and project spend plans are according to schedule and within the approved budget.</li><li>• Monitor the progress of all CDCR IT acquisition requests to ensure alignment with portfolio resources. Escalate to CDCR executive management as appropriate.</li><li>• Create and maintain a working environment that encourages mutual cooperation between EIS programs, IT projects, and EIS staff.</li></ul>
35%	CDCR IT Portfolio and Financial Management Program	<ul style="list-style-type: none"><li>• Develop and maintain policies, best practices, and processes to be used by all EIS managers and staff to effectively manage IT resource allocations, availability, and assignment to all IT projects and operational workload.</li><li>• Partner with the EIS Applications Maintenance and Support Unit, SharePoint/Web Solutions, and Business Information Systems to ensure all business requirements for PPPMA are satisfied by the automated tools.</li><li>• Review and interpret all CDCR EIS IT Resource and Portfolio Management practices for alignment with and support of any control agency policies and requirements.</li><li>• Maintain a portfolio and financial management plan for EIS programs and IT projects.</li><li>• Develop, convert, and retain all PPPMA, portfolio, and cost accounting information for active management of projects and EIS programs, as well as for historical purposes, per records retention cycles.</li><li>• Provide and maintain timely and accurate portfolio, financial information, and reports for the organization's Enterprise Portfolio Management activities, including the ability to produce reports, as required, by all EIS stakeholders – EIS management and staff, CDCR executives, control agencies, etc.</li><li>• Develop, implement, and apply performance metrics to evaluate the effectiveness of EIS programs and IT projects.</li></ul>
20%	Train and Mentor	<ul style="list-style-type: none"><li>• Whenever and wherever possible, advocate the use of PPPMA best practices, including the systems and tools designed to support those best practices. This includes training EIS and CDCR management and staff in the use of the practices, templates and tools, and the most valuable ways in which they can collect, store, use, and report on PPPMA data.</li></ul>

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- Review and interpret current state IT portfolio and financial management policies, instructions and guidelines and advise executives and staff of any impact to CDCR practices.
- Develop, implement, deliver, and maintain training curriculum to ensure policies, practices, and processes are appropriately followed.
- Mentor CDCR personnel on the effective use of the PPPMA management processes.
- Participate in EIS Project Management Roundtable meetings for sharing lessons learned and various workshops and user groups related to best practices.

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Immediate Supervisor: \_\_\_\_\_

Date: \_\_\_\_\_