



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Benefits & Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 434 - 4864 - 023
DIVISION/UNIT Service Retirement/Projects & Innovation	CLASS TITLE Pension Program Manager I (Specialist)
INCUMBENT NAME VACANT	WORKING TITLE Projects & Innovation Specialist
CalSTRS is dedicated to securing the financial future and sustaining the trust of California’s educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.	
<p>Under the direction of the Pension Program Manager II, the Pension Program Manager I (Specialist) operates as a Subject Matter Expert (SME) for Service Retirement (SR) and is responsible for the most complex cross functional Service Retirement assignments. The PPM I (Specialist) independently researches, analyzes, designs, develops, tests, evaluates, and delivers project deliverables for the support of the new pension system and related processes and procedures. The PPM I (Specialist) independently organizes, plans and conducts the most complicated analyses regarding system ability to adopt program, legislative, and regulatory changes and systems development and deployment throughout CalSTRS. The PPM I (Specialist) has expert knowledge of the current pension administration system, extensive knowledge of the replacement pension administration system, Service Retirement (SR) business processes, and CalSTRS processes; the ability to research and analyze unique problems accurately, develop appropriate solutions, and recommend effective courses of action; and identify improvements and develop and propose innovative solutions. The PPM I (Specialist) has detailed knowledge of the California Teachers’ Retirement Law, and other related laws, regulations, policies and procedures.</p>	
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.
	<p>ESSENTIAL FUNCTIONS</p> <p>35% <u>Cross-functional Project Consultation</u>: Serve as an expert resource, team member, or lead on cross-functional teams including but not limited to Pension Solution efforts; provide expert consultative services to internal and external business partners, executive/senior leadership and Pension Solution vendors, perform complex analysis and make critical decisions regarding design specifications for BenefitConnect prior to implementation and ongoing system maintenance and future functionality post- implementation, inform SR leadership and project team of perceived and identified problems, issues and risks, and recommend solutions; present to leadership and/or staff/client groups as necessary.</p> <p>30% <u>Systems Development, Maintenance and Subject Matter Expert</u>: Represent Service Retirement as a system expert; partner with Application Development and Project Management for systems development, enhancement and maintenance with substantial impact; with an extensive understanding of CalSTRS System Development Life Cycle (SDLC) methodology and expert knowledge of the START System, BenefitConnect and SR and Cash Balance (CB) processes, procedures and workflows: independently analyze business area needs; lead discussion, analyze and make decisions in Joint Application Design (JAD) sessions to identify and develop business requirements for BenefitConnect; write test plans/cases for user acceptance testing (UAT); coordinate testing efforts with staff; serve as an expert resource and perform UAT. As a Subject Matter Expert for SR, effectively collaborate with internal and external partners on behalf of SR and CalSTRS, maintain a high level of knowledge of SR’s current processes and workloads, participate in workgroups, complete research and difficult tasks associated with design and testing, and follow through on important milestones and deliverables to ensure project deadlines are met. Participate in Pension Solution activities, including system testing.</p> <p>20% <u>Process Improvement, Communication, Training/Knowledge Transfer</u>: Identify and recommend process improvements to achieve increased productivity and improved accuracy; identify and anticipate impacts of system modifications on SR and other business areas; lead team efforts to develop process, procedure and workflow changes in response to system modifications; assist in the development of technical training to staff. Assist with and/or develop communications related to implementation of systems modifications which may include enhancement requests, job aids, training materials, and system-generated letters. Independently as well as collaboratively design, develop and conduct educational courses in a professional, effective manner to instruct SR staff on the new pension system and related business processes. Including assisting staff transition from the current system and processes to the new system</p>

	and the related modified or new processes. Independently and collaboratively research, analyze, prepare and maintain process, procedure, testing and training documents, job aids, etc. Provide technical oversight during implementation and training phases of the project and manage resourcing, fallout and resolutions. Ensure technical and procedural knowledge is transferred to operational staff via training resources.
10%	<u>Innovation or Implementation Task Force</u> : Maintain business and technical knowledge to ensure information is accurate based on business practices and future state. Understand and incorporate new information and utilize existing resources appropriately. Maintain working knowledge of CalSTRS policies, processes, trending topics and pending legislation. Maintain cross-functional problem solving, critical issue resolution and provide support to all SR business units as necessary during technical deployment of BenefitConnect.
5%	MARGINAL FUNCTIONS <u>Team Participation</u> Serve as a resource/team member on cross functional teams to establish and maintain timely and accurate payment of benefits in support of the Service Retirement vision and mission.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS’ core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies.

Understanding and demonstration of these additional competencies supports the senior specialist’s daily performance:

- Decision Making
- Diagnostic Information Gathering
- Ethics and Integrity
- Influencing Others
- Interpersonal Skills for Relationship Building
- Planning and Organizing
- Professional and Personal Development
- Technical/Professional Knowledge and Skill
- Thoroughness

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values

Service Retirement Vision: Lead the way with stellar service, support of people and a culture of innovation and excellence.

Service Retirement Mission: Establish and maintain accurate and timely Service Retirement benefits.

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

WORK ENVIRONMENT

- Prolonged periods of sitting.
- Work in a high-rise building in an open space environment.

PHYSICAL ABILITIES

815-434-4864-023

- Ability to use a computer several hours a day.
- Ability to lift up to 10 pounds.

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED