

## DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits & Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 435 - 4864 - 014	
DIVISION/UNIT Disability & Survivor Benefits/Projects & Innovation/Systems, Training, Engagement & Projects	CLASS TITLE Pension Program Manager I	
INCUMBENT NAME Vacant	WORKING TITLE Systems, Training, Engagement & Projects Manager	
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.		
Under general direction of the Projects & Innovation Manager, Pension Program Manager II, the Systems, Training, Engagement & Projects (STEP) Manager plans, organizes and supervises analytical and technical staff within Disability & Survivor Benefits (DaSB) that is responsible for division wide training and communication needs for both normal business needs and Pension Solution needs. The STEP Manager will also be responsible for overseeing staff who participate on both systems development and enhancements for both normal business needs and Pension Solution Project needs.		
% 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.	
30%	<p><b>ESSENTIAL FUNCTIONS</b></p> <p><u>Lead and Manage Team:</u> Manage resources and oversee day-to-day operations of the STEP Team. Provide statistical reporting as to progress made along with solutions to challenges and opportunities. Ensure coverage of resources at team level for both regular business and Pension Solution Project needs. Recruit, develop and mentor staff. Provide timely feedback, and appropriate recognition and consistent support to staff to maximize overall performance. Observe and evaluate direct report performance during interactions in team meetings, one-on-one discussions, and side-by-side coaching and provide input, guidance, training and correction when needed to build staff objective feedback to enhance growth, build competency, and improve overall performance, including but not limited thorough probation reports, annual performance reviews and individual development plans.</p>	
25%	<p><u>Training:</u> Develop training in a manner that conforms to the evolving needs of DaSB through singular or blended training methods including but not limited to formal classroom training, personal and individual interaction, and e-learning. Provide direction to staff who facilitate training. Oversee the creation and maintenance of DaSB procedures, job aids and other training material. Meet with leadership to monitor, establish and prioritize learning opportunity needs to improve division performance. Ensure consistent, business relevant and accurate information is contained in the training modules and procedures being utilized in the training sessions. Partner and confer with others at all levels to establish and evaluate current and future training needs of the division’s production area and other business areas regarding DaSB.</p>	
20%	<p><u>Communication:</u> Review internal and external DaSB communications applying proper grammar, spelling, and vocabulary usage while complying with the CalSTRS style guide. Review all correspondence pertaining to work handled by DaSB including but not limited to forms, letters, templates and memorandums. Ensure all correspondence changes cycle through the established review process both inside and outside the division and through the Pension Solution Project as needs arise. Serve as the division communication liaison and provide updates as needed. Communicate any system information that may affect DaSB production in a timely and business relevant manner.</p>	
10%	<p><u>Technical System Processes:</u> Review requests for data changes to the pension system of record. Assist with testing activities for both normal line of business functions and Pension Solution. Testing activities include but are not limited to review and creation of both Test Execution Checklists (TEC) and test cases, User Acceptance Testing (UAT) is performed and results and incidents are reported accurately. Assist with requests for data from the pension system of record and assist with reviews of said requests to ensure information requested is accurately extracted.</p> <p>Ensure accurate and efficient progression of various work efforts including those associated with system updates and enhancements by representing DaSB interests in an effective manner. Provide updates as to status of various work efforts of day-to-day production along with project related efforts while striving for completion. Define the tasks and milestones to achieve project objectives and recommend solutions and</p>	

10%	<p>resolutions. Identify problems and recommend alternative solutions to achieve increased customer service levels, productivity, and improved consistency and accuracy for benefit application and payment processing.</p> <p><u>Change Management:</u> Serve as Change Champion Liaison for the Pension Solution Project while representing DaSB and disseminate business relevant information through written and verbal communication. Ensure and track the timeliness and accuracy of all Pension Solution related training of DaSB employees including but not limited to enrolling appropriate staff for training, developing and facilitating DaSB versions of training, creating and delivering process change guides and update as needed.</p>
5%	<p><b>MARGINAL FUNCTIONS</b></p> <p>Act on behalf of other managers and testify to actions taken by DaSB when required. Lead or participate on organizational, cross-functional, and division project teams representing DaSB including Pension Solution test efforts, Pension Solution correspondence review and other Pension Solution Project activities as needed.</p>

**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. All employees are expected to understand and demonstrate their position’s CalSTRS class competencies:

- Change Leadership
- Conflict Management
- Decision Making
- Developing Others
- Empowering Others
- Ethics and Integrity
- Managing Work
- Planning and Organizing
- Risk Management
- Team Leadership
- Vision and Strategic Thinking

**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

**WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB**

- Occasional travel to various locations for training and/or meetings
- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer several hours a day
- Ability to move up to 15 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:**

815-435-4864-014

**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



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

## DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits & Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 435 - 4800 - XXX	
DIVISION/UNIT Disability & Survivor Benefits/Projects & Innovation/Systems, Training, Engagement & Projects	CLASS TITLE Staff Services Manager I	
INCUMBENT NAME Vacant	WORKING TITLE Systems, Training, Engagement & Projects Manager	
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SUPERVISOR'S SIGNATURE

DATE SIGNED

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