

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Technology Services		POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 640 - 1414 - 905
DIVISION/UNIT BenefitConnect / Production and Test Team		CLASS TITLE Information Technology Specialist II
INCUMBENT NAME Vacant		WORKING TITLE Operational Reports Lead
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 Production and Test Team Manager (Information Technology Manager I) the Operational Reports Lead (Information Technology Specialist II) oversees the components of the technical infrastructure that are CalSTRS responsibility or require collaboration between vendors and CalSTRS technical resources. The incumbent maintains relationships with technical resources in the Technology Services Division and BenefitConnect teams to facilitate timely implementation and maintenance of all components of the BenefitConnect IT infrastructure. Additionally, the incumbent serves to provide appropriate IT governance for the BC's IT landscape in accordance with CalSTRS' approved technology standards, processes, benchmarks, and security practices.		
% 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.	
35%	ESSENTIAL FUNCTIONS Technical Leadership & Guidance Contribute to the strategies and plans for managing the implementation of the Operational Reports, specifically the reporting engine connected to the BenefitConnect (BC) application, built on the Microsoft SQL Server Reporting Services (SSRS) platform and managed by CalSTRS. Collaborate closely with the BC vendors, and other contractors to ensure effective integration and functionality of the reporting engine. Partner with Production and Test Team Manager and BC Assistant Director-Technical to review and approve all strategies and plans, before implementation. Facilitate the execution of approved strategies to maintain and enhance the operational reporting capability within the BenefitConnect application, ensuring that reporting needs are met efficiently and effectively.	
35%	Technical Duty & Responsibility Manage the entire life cycle of SQL Server Reporting Services (SSRS) reports, including requirement gathering by collaborating with stakeholders to define key data points, user roles, and Key Performance Indicators. Lead and manage creating report mock-ups to confirm layouts and calculations and provide the direction to configure data sources and parameters. Orchestrate and conduct rigorous testing to ensure data accuracy and functionality, deploy reports to the Report Server while managing user roles and subscriptions, and oversee maintenance activities such as performance monitoring and report decommissioning. Assess change requests by analyzing impacts on existing reports, maintaining version control, securing approval for design updates, and implementing changes by re-publishing as needed, ensuring reports meet organizational standards, and provide valuable insights to end users.	
25%	IT Governance, Technical Standards & Best Practices Ensure compliance with CalSTRS IT standards, governance, and security policies and procedures. Analyze and identify deficiencies in the processes, practices, procedures, and techniques utilized to monitor and maintain BC's IT infrastructure; develop and propose improvements to strengthen quality controls and address those deficiencies. Coordinate, as needed, with the Change Control Board within the Technology Services Branch. Responsible for communicating, guiding, and mentoring other technical stakeholders on improving the efficiency, quality, consistency, and productivity of IT infrastructure efforts as cohesive and integral parts of a Software Development Life Cycle (SDLC). Maintain relationships with vendors and report compliance with CalSTRS standards and procedures to the BC Division Production and Test Team Manager and Assistant Director - Technical. Observe and report on vendor performance in areas that include quality, capacity, systems, and responsiveness, and track and report on system performance and service levels to ensure they are being met.	

5%

MARGINAL FUNCTIONS

Support the broad functions of the Production and Test Team, which provide overall guidance to the BC Division regarding technical and system components, software, configurations, management, security, and maintenance to keep the Division's technologies performing optimally. Support ongoing continuous improvement efforts within BC, Benefits and Services, and Technology Services branches.

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 located in the [Competency Guide](#) on Central.

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
- Support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard up to eight hours a day
- Read from computer screens up to eight hours a day
- Ability to move 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