CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

[X] PROPOSED

[ ] CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Executive	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 104 - 7500 - 001
DIVISION/UNIT Enterprise Strategy Management	CLASS TITLE Career Executive Assignment, B
INCUMBENT NAME Vacant	WORKING TITLE Director of Enterprise Strategy Management

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 the general direction of CalSTRS Chief Operating Officer (COO), the Director of Enterprise Strategy Management (ESM) has full management responsibility for the operations of the Enterprise Strategy Management Division. The Director of ESM provides senior leadership and policy guidance to the ESM Division, which includes Strategy & Organizational Performance; Survey Research & Analysis; Research & Development; Continuous Improvement; the Innovation Program and Corporate Sustainability. The Director of ESM is responsible for the overall planning, development, organization, monitoring, evaluation and documentation of CalSTRS strategic and business plans; serves as the chief policy advisor for all aspects of CalSTRS strategic and business planning processes and protocols; oversees the development of enterprise-wide performance measures; and directs business process improvement projects throughout the organization to contribute to overall efficiency. The Director of ESM oversees all internal and external survey and analysis, pension plan research and development, and assimilates the data and integrates it into policy recommendations. The incumbent acts as a policy advisor and staff expert to the Teachers' Retirement Board (TRB), CEO, and Executive staff on strategy, business planning, and critical issues facing public pension plans.

% 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.
	ESSENTIAL FUNCTIONS
25%	Direct the development and implementation of policies for Enterprise Strategy Management programs and operations. Provide leadership, management and policy direction for the work activities and performance of the ESM Division. Plan, direct and organize the work of staff responsible for administering the Strategy & Organizational Performance; Survey, Research & Analysis; Research & Development; Continuous Improvement; CalSTRS Innovation and Corporate Sustainability programs and ensure the division's work is clearly aligned with the strategic priorities of the TRB. Act as the chief policy advisor to CalSTRS leadership for all aspects of the strategic and business planning process and protocols, for product and service level evaluation and recommendations, corporate sustainability and for research related to plan design and related strategy.
15%	Act as a policy advisor and internal technical expert to the TRB, CEO, and Executive Staff, in recommending and implementing policies and strategies for the development of the TRB's Strategic Plan. Partner with Executive staff to translate TRB's long-term strategic goals and objectives into the Annual Business Plan. Participate in board meetings and deliver formal written and oral presentations. Provide briefings, continuing education and expert consultation and advice to the TRB in rendering decisions related to the development of CalSTRS long-term Strategic Plan. Guide and facilitate board discussions and exercises to assist the TRB in evaluating the organization's strategic position. Oversee annual environmental scan activities including assessing CalSTRS strengths, weaknesses, opportunities, and threats (SWOT), potential legislative changes, and current and future projects that impact the system's long-term sustainability. In partnership with the Board's Governance Consultant, assist the TRB in its periodic assessment of the Strategic Plan to evaluate factors that may require a shift in strategic priorities. Participate in strategy meetings with the Chief Executive Officer and members of Executive staff to strategize critical approaches to challenges facing CalSTRS and the public pension debate.
15%	Oversee the activities of the Strategy & Organizational Performance program including the overall planning, development, organization, monitoring, evaluation and documentation of CalSTRS strategic and business plans and the CalSTRS Innovation Program. Formulate the strategies for the establishment of an enterprise-wide framework of performance measures that reinforce accountability, improvement and transparency of all key responsibilities at CalSTRS. Oversee the activities of business performance reviews. Partner with Executive staff to establish appropriate performance benchmarks that improve internal efficiency and identify root cause barriers to meeting benchmarks. Direct and oversee the Innovation Program by establishing strategic priorities, fostering a culture of continuous improvement, guiding cross-functional innovation initiatives, and ensuring the successful development of innovative

	solutions that advance organizational goals and operational excellence. Partner closely with Technology Services on ideas related to technology (including Generative AI) that originate from the Innovation program.
15%	Direct the development of custom research programs and strategies for the organization in accordance with the sensitive nature of the research topics and data. Oversee the activities of the Survey, Research & Analysis program that integrates and synthesizes an organization-wide and pension industry perspective into research studies to achieve relevant outcomes. Oversee research designs and studies that propose and test constructs for impact to California's educators, Country Offices of Education, school districts, and community college districts, to increase understanding of members' experience, retirement knowledge, retirement preparedness and engagement. Direct the activities of the Research & Development program to research and evaluate aspects of plan design and political trends. Oversee, monitor and evaluate conditions in the internal and external environments such as political, legislative and economic events and changes that could have a significant impact on public pensions and retirement security. Prepare and deliver reports outlining the results of solid research to assist the TRB in understanding precedent and factors to consider in decisions they are undertaking. Oversee the Business Lead for the CEM Benchmarking survey project and peer group network to focus on the cost and effectiveness of our products and services in relation to comparable public pension.
15%	Direct a Continuous Improvement Program to provide quality evaluation, research, analysis, synthesis, and application of industry best practice to prepare evidence-based studies. Ensure implementation of business process improvements based on BPI/BPR methodology and in alignment with industry best practices and CalSTRS enterprise business model. Collaborate with executive project sponsors to foster consensus, lead change and gain commitment. Establish department-wide policies (e.g., to continue, expand, modify or eliminate programs/services, etc.) for cost effectiveness, improved services, better quality results or risk mitigation purposes. Collaborate with Audit Services, Enterprise Compliance Management and Enterprise Risk Management to develop consistency and alignment with CalSTRS programs. Serve as the Executive Branch's risk champion and serve as a member of the Project Review Council.
10%	Direct the design, development and implementation of CalSTRS Corporate Sustainability policy and program. Establish and implement a sustainability reporting framework according to the Global Reporting Initiative guidelines. Manage risks to the organization through the design, development and implementation of policies and practices that integrate environmental, social and governance (ESG) principles into CalSTRS culture and strategies. Design, develop and implement policy for vendor sustainability practices and policy that emphasizes CalSTRS commitment to sustainability practices and requirements in the procurement of products and services. Unify sustainability activities throughout the organization to design a clear and cohesive corporate sustainability direction and communicate a consistent message.
	MARGINAL FUNCTIONS
5%	Participate in cross functional teams on special assignment. Maintain relations with external stakeholders and research institutions to advance the concerns of CalSTRS.

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

- Occasional overnight in state/out of state travel for meetings and training
- Work in a high-rise building
- Work in a blended work environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day

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