CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

☐ PROPOSED

☒ CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 437 - 4802 - xxx
DIVISION/UNIT Customer Service	CLASS TITLE Manager II
INCUMBENT NAME Vacant	WORKING TITLE Assistant Director (Contact Center, Production Support, Workforce 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.

The Assistant Director (Contact Center, Production Support, Workforce Management) – Manger II, is a member of the senior leadership team within the Benefits & Services Branch and Customer Service. The Assistant Director collaborates with the other members of the Customer Service leadership team to achieve Customer Service's performance objectives and maximize member satisfaction. The Assistant Director closely collaborates and partners with the Assistant Director (Contact Center, Learning and Quality Assessment) to build trust and support in the Customer Service Division. All staff are expected to demonstrate diplomacy and professionalism and to treat each internal and external customer with dignity and respect while working to resolve member issues.

Under administrative direction of the Director of Customer Service, the Assistant Director (Contact Center, Production Support, Workforce Management), oversees the production functions of CalSTRS Contact Center, Account Services, Workforce Management, and Production Support while providing Customer Service leadership and staff with the tools necessary to meet performance metrics and maintain industry-standard customer satisfaction scores. Through subordinate managers, and in close cooperation with benefit program peers, the Assistant Director oversees front-line member service through CalSTRS Contact Center and the operations supporting front-line staff.

% 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%	In close collaboration and partnership with the Assistant Director (Contact Center, Learning and Quality Assessment) the Assistant Director co-leads CalSTRS Contact Center and ensures members receive consistent, accurate, complete, and timely responses to their inquiries. Through subordinate managers, the Assistant Director oversees the day-to-day operations of the Contact Center by monitoring service levels and performance, leveraging a variety of tools and information for efficient and effective member service to increase member satisfaction and employee engagement.
20%	The Assistant Director ensures staff resources are deployed to maximize short-term service levels while collaborating to maintain adequate long-term information management, data stewardship, and member account functions, effectively overseeing the units under the Production Support and Workforce Management sections of Customer Service, Account Services, Resource Management, and telephony, data, and project specialists. Directs and supports the Account Services manager and team by overseeing the service performance of analytical and technical staff who maintain member accounts and perform of high-volume, cyclical workloads. Ensures compliance with the Education Code and internal policies and procedures, internal controls are followed, and any deficiencies are identified and corrected. Assists the Director of Customer Service on CalSTRS' highly-visible and mission critical projects including data preparation; coordinates the use of subject matter experts; thoroughly and accurately identifies business requirements for all Customer Service program areas; organizes process and procedure changes based upon new technology; ensures documentation is updated as appropriate; and coordinates staff and leadership training for overlapping projects. Responsible for identifying BenefitConnect risks and mitigating strategies, opportunities for change management. Works with the Customer Service leadership team to identify and document risk management oversight roles and responsibilities. Develops and maintains a risk management plan aligned with organizational directives; establishes components of an effective control environment to set an appropriate tone for the division; identifies, analyzes, and mitigates risks to achieving division and organizational objectives; establishes guidelines and procedures that ensure management directives are successfully implemented. Collects and reports pertinent information regarding risk management activities and monitors the system of internal controls to ensure directives, guidelines, and procedures are consistently applied over the long term. Participates as a member of

	senior leadership, is involved in department strategic planning and review, and coordinates any validation and corrective action resulting from program and departmental audit reviews.
15%	The Assistant Director ensures Customer Service possesses the necessary talent to achieve its business goals. Develop and maintain Customer Service staff through subordinate managers, oversees staff recruitment and selection; ensure performance expectations are clearly communicated and uniformly applied across the division; monitors staff probationary reports, annual evaluations, and development plans to ensure consistency with division specifications; and ensure leaders and staff receive regular effective feedback and coaching. Recruits and selects new leadership team members that exhibit CalSTRS core competencies and values Provides constructive feedback to build the leadership skills of subordinate managers; observes manager interaction in team meetings, one-on-one discussions, and side-by-side coaching and provides input and guidance to build manager skill and competencies; and ensures consistent compliance with all Human Resource policies and procedures. Builds systems and processes to identify and address staff training, development, and coaching needs to achieve both short-term performance goals and long-term organizational success; uses a variety of tools and reports to track staff performance and assess organizational competency development; identifies where advancements can be made and sets targets that are specific, measurable, achievable, realistic, and time bound (SMART) to incrementally improve staff knowledge, skills, and abilities; and develops systems to identify and coach staff with promotion potential.
15%	As a member of Customer Service's senior leadership team, collaboratively develops and implements division strategy and annual Business Plan. Recommends initiative prioritization based upon strategic alignment with organizational goals and objectives, resource availability, and impact cost/benefit; oversees the development and implementation of Customer Service's Business Plan; and aligns the Business Plan to achieve division and organization strategic objectives. Develops action plans and timelines for assigned initiatives/projects; allocates resources to complete action pans; and monitors progress on all division projects and initiatives and provides guidance and coaching to division managers, as needed, to ensure action steps are completed on time and within specifications; provides regular status updates through one-on-one discussions with the Director, weekly reports, and monthly business review meetings. Identifies the need for new or updated policies and procedures; directs the development, modification, and maintenance of all division procedures.
10%	Actively supports, administers, and enforces organizational policies and objectives. Partners with the other members of the Customer Service leadership team to define consistent staff expectations across the division; clarifies and resolves expectation discrepancies; and maintains good attendance with minimal unplanned absences. Consistently demonstrates CalSTRS core values and competencies; adheres to organizational leadership expectations and serves as a role model to staff; builds a shared vision and influences others to translate vision into action; sustains a sense of humor under difficult circumstances; builds a healthy working environment to support CalSTRS efforts to be an employer of choice; builds mutual understanding of functional interdependencies.
10%	Professionally and effectively represents Customer Service on project teams. May lead or participate on organizational and division project teams; defines tasks and milestones to achieve project objectives; develops better or faster ways to accomplish tasks; works cooperatively with others to produce innovative solutions; effectively communicates Customer Service's perspective on cross-functional project teams; anticipates possible problems and develops recommendations for resolution; and provides regular project updates to the Customer Service leadership team
	MARGINAL FUNCTIONS
5%	Represent the Customer Service Director as needed. Attends CalSTRS board meetings, Client Advisory Committee meetings, and Employer Advisory Committee meetings representing the Customer Service Director as needed. Leads or participates on branch project/teams and/or cross-functional projects/teams.

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
- Ability to support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Work in a high-rise building.
- Office setting with an open floor plan and low partitions.
- Some lifting of up to 20 pounds.
- Ability to use a computer keyboard several hours a day for entry and research of information.
- Read from computer screens several hours a day.
- Ability to speak on the telephone for extended periods of time.
- Prolonged periods of sitting.

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