CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

☐ PROPOSED

☒ CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Technology Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 626 - 1401 - 032
DIVISION/UNIT Enterprise IT Governance/IT Budgeting & Administration	CLASS TITLE Information Technology Associate
INCUMBENT NAME Vacant	WORKING TITLE Technology Budget Associate

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 supervision of the IT Budgeting & Administration Supervisor, the Technology Budget Associate shall oversee financial analysis of IT investment in systems, services, and technologies. Duties include reviewing and monitoring of program and project budgets, preparation of and monitoring of annual budget and expenditure plans, and reporting of IT investments according to different IT categories and business capabilities to make recommendations to management and executives. The Technology Budget Associate meets regularly with Program Managers and Technology staff in order to gather information needed for planning, forecasting, and reporting of the IT budgets and expenditures.

% 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
35%	Manage the budgets and financial forecasts of the Technology Services (TS) program and associated bodies, such as the Enterprise Project Investment Council (EPIC), to aid in maximizing the utilization of financial resources and monitoring cost performance. Assist in developing budgets and financial forecasts. Facilitate the compilation of expenditure projections by meeting with TS management and project managers/leads to understand IT plans and efforts to determine their impact to IT strategic and financial plans. Analyze expenses to date using the enterprise financial system, BusinessDirect (BD), and utilize various forecasting methods and make recommendations on funding approval requests. Allocate overall cost estimates to individual work items (e.g., account assignments, commitment items, work breakdown structures) to help management establish a baseline for measuring performance. Ensuring that appropriate project or program changes are included in revised baselines. Provide analysis to resolve budget/expense issues impacting TS budgets, projects, and BD. Perform contract analysis to determine impacts to budget for current and future years. Prepare budget transfers as needed based on contract, budget, and business needs justification analysis. Review journal entries created in BusinessDirect by the Financial Services Branch. Maintain and monitor repository of budget and spending trend information for forecasting purposes.
25%	Responsible for independently gathering data, organizing information, monitoring costs, and ensuring all fiscal controls are met for all the TS programmatic and project budgets. This includes writing reports and developing presentation materials as required. Analyze requests for funding needs and update data to ensure all budget and expense information is current to ensure projected expenditures are within budget. Monitor and raise issues related to the technology budgets. Recommend and/or apply internal (and sometimes external) policies, procedures, and documentation that will be used for planning, executing, and controlling costs and budgets, as needed. Maintain accountability and quality control for budget reports. Plan, organize, and develop training, ad-hoc reports and presentations for management, customers, and peers on various aspects of budgeting. This may include training on Budget Change Proposal preparation, understanding how to manage a budget, and preparation of reports for management, as required.
20%	Produce reports and data analyses for management and stakeholders to ensure IT resource usage is aligned with IT strategic plans. Collaborate with IT stakeholders to ensure accurate classification of IT goods and services to defined business capabilities and categorization schemes to forecast and analyze the usage of TS fiscal resources. Benchmark TS expenditures to other IT organizations and provide analysis for management on differences.
15%	Serve as the Technology Services/liaison/subject matter expert to the Financial Services Branch, other CalSTRS business areas, and Technology Services Branch. Work independently and directly with Branch Directors and Executive. Work with the Technology Services Contract, Vendor and Asset Management team on the financial aspect of the vendor contract, including contract amendments, payment & schedule changes and to ensure accurate and timely payments on contract deliverables.

5%	**MARGINAL FUNCTIONS** Provide backup support for Enterprise IT Governance staff in the IT Admin Support unit. Provide advice and information to Branch senior management regarding budget policy and procedures.

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 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