

POSITION SUMMARY

This position performs expert level work under the general supervision of the Data Management Bureau Supervisor. This position is the principal technical authority for Business Intelligence (BI) at ETF which also includes related functions of advanced prescriptive and predictive analytics, data warehousing, metadata management, and data literacy. This position provides direction, guidance, and consultation for BI to the agency, including technical staff in the Data Management Bureau, business managers, data analysts, project managers, business analysts, and other business staff across the department in a federated model. This position establishes agency-wide policies, standards, and guidelines for BI to be implemented by BI developers and data analysts throughout the agency to meet the varied and diverse business needs of program and enterprise support managers and staff. This position also provides BI consulting to management and staff on the use of BI, interpreting data, identifying opportunities, and recommendations for KPI's and other metrics.

This position will have a leadership role in the analysis of business needs and the design and maintenance of solutions for visualizing data (stages of exploration, analysis, synthesis, presentation), designing a data warehouse, implementing data management solutions, and promoting data driven decision making. The position has high-level expertise on data analysis, metadata management, data literacy, data modeling, data dictionaries, data warehousing ETL tools, and reporting tools. Other duties of this position include preparing technical specification documents, development, testing, implementation, mentoring developers, and ongoing maintenance of data management solutions. This position resolves conflicts and problems through the skilled application and practical knowledge of data management principles.

This is an expert-level position performing difficult and complex work. This may include developing use cases and/or test plans to illustrate current state to future state definition and developing and validating requirements and specifications. This position interacts with business users to assure a mutual understanding and agreement on requirements and specifications. In order to effectively leverage the business value of data, this position will need to play a critical liaison role with our business partners to promote a data-driven culture. This position will help drive ETF's maturity with BI & Analytics from descriptive & diagnostic to predictive & prescriptive, along with implementing other advanced analytic techniques.

This position will independently serve as the principal authority for business intelligence and analytics and provide expertise for multiple complex projects. This position is an expert in industry best practices with the ability to perform the most advanced level of work requiring application of the highest levels of theoretical and practical knowledge to benefit ETF implementations. This will include mentoring and leading technical and business staff across the agency to ensure best practices, policies, and procedures are followed. This position will also lead various committees and user groups at ETF to advance BI & Analytics, work closely with DOA technical staff, and represent ETF on statewide committees working with other agencies.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 630,000 members receiving \$5.6 billion in retirement benefits and \$1.6 billion in health benefits annually. This position directly supports the agency strategic goal focused on building a talented and agile workforce necessary for achieving the department's mission to develop and deliver quality benefits and services to our members while safeguarding the integrity of the Trust. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

GOALS AND WORKER ACTIVITIES

- 40% GOAL A: Provision of expert-level direction, guidance, and consultation on matters relating to business intelligence.**
- A1. Provide leadership to evaluate, select and implement BI solutions and data management tools, providing vendor coordination and management.
 - A2. Facilitate and lead requirements definition, evaluation, implementation, and support of BI solutions.
 - A3. Establish and administer BI policies along with supporting standards, guidelines, best practices, and procedures for managing department-wide data resources, which impact both logical and physical design aspects.
 - A4. Plan and implement ETF BI solution administration duties, projects, and coordination of upgrades to meet performance targets and adhere to data-related standards, policies, and procedures.
 - A5. Establish data access methodologies and develop recommendations for disaster recovery planning and implementation.
 - A6. Collaborate with DOA and other agencies for BI solution upgrades, feature utilization, and product roadmap input to vendor.
 - A7. Provide expert level direction to various ETF committees and user groups to advance BI, work closely with DOA technical staff, and represent ETF on statewide committees working with other agencies.
 - A8. Develop and implement training for BI solutions and the implementation of privacy/security policies in BI solutions. Regularly assess security risks.
 - A9. Serve as a trusted partner by developing collaborative working relationships with business area data owners, data stewards, data analysts, dashboard consumers, business process owners, and management.
 - A10. Plan data conversion and interfaces needed for BI solutions.
- 30% GOAL B: Leadership of data analysis, reporting and analytics development, and supporting activities for the agency.**
- B1. Lead, design, develop, and perform testing of data and reports using the data lake platform provided to ensure high quality deliverables and solutions that answer business questions/needs.
 - B2. Provide data modeling expertise (including tabular), data warehousing, and ETL recommendations to integrate effectively with BI solutions for the agency.
 - B3. Determine and approve how data entities are stored and the appropriate storage structures needed for BI solutions.
 - B3. Provide expert direction for reporting/analytics to business management including the use of BI, interpreting data, identifying opportunities, and recommending KPI's and other metrics.
 - B4. Develop and maintain a thorough understanding of ETF data sources and administer data models, using them to access metadata and the data itself consistent with enterprise models.

- B5. Analyze complex data sets, draw conclusions and relationships, and perform data reconciliation.
- B6. Perform data profiling and provide development of data quality exception reporting.
- B7. Lead efforts to design and implement a process to execute design and code reviews for agency staff performing data analysis and creating Tableau dashboards.
- B8. Lead Tableau site administration (e.g. establishing standards or checklists, publishing dashboards, organizing artifacts, coordinating security and access control).
- B9. Provide leadership in technical support and deployment assistance for data management solutions.

20% GOAL C: Leadership of functions that enhance a data-driven culture.

- C1. Lead agency maturity levels for data literacy, providing recommendations for improvements by promoting best practices and success stories, identifying training, and encouraging peer-to-peer knowledge.
- C2. Lead agency maturity levels metadata management, providing recommendations for improvements by promoting best practices and success stories, connecting business need to implementation, and encouraging peer-to-peer knowledge.
- C3. Consult and advise management and key data-related roles on data literacy, business intelligence, and metadata management.
- C4. Provide leadership in the analysis and problem-solving for data literacy, business intelligence, and metadata management challenges and issues.

10% GOAL D: Other duties as assigned.

- D1. Provide project plans, estimation, and leadership for projects as required.
- D2. Document existing data management solutions as requested.
- D3. Develop and present effective decision papers, presentations, and recommendations.
- D4. Prepare status reports, manuals, handouts, demonstrations, and training materials for end users or other technical and business staff as requested.
- D5. Stay current on data management and related industry trends utilizing web resources, online training, books, internal documents, training sessions and workshops.
- D6. Provide mentoring and training for data management staff and other business stakeholders as needed.
- D7. Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

1. Advanced leadership skills in developing business intelligence solutions.
2. In-depth understanding of data management principles (strategy, governance, accountability, standards, integration, quality) to enhance business outcomes.
3. Advanced skill gathering, understanding & documenting user requirements, creating specifications, designing solutions, development, testing, and implementing solutions that ensure requirements are achieved through high quality deliverables.
4. Advanced skills in dashboard design, full life cycle management, and the application of best practices including use of visual design principles.
5. Skilled in providing direction and mentoring to developers and team members on dashboard development, usability, user experience design and design best practices.
6. Skilled in telling a story about data and visualizing it effectively.
7. Advanced knowledge of data literacy concepts.
8. Ability to implement metadata management practices
9. Advanced skills for implementing quality assurance and developing standards to certify dashboards and data sources for production use.
10. Advanced skills in performing Tableau Server site administration, including any optimization, tuning, and ensuring the security of data using Tableau Server or related tools.
11. Strong knowledge of Master Data Management (MDM) principles, strategies, and tools.
12. Ability to use various ETL tools and processes (e.g. SSIS, Alteryx, etc.).
13. Strong skills to perform data profiling and data quality reporting.
14. Ability to use source code version control software.
15. Strong knowledge of data warehouses and data models as data sources for dashboard development.
16. Knowledge of cloud solutions for data warehousing and business intelligence.
17. Strong ability to manage multiple, concurrent, 3 to 6-month BI dashboard design and development projects.
18. Skilled in using complex SQL with relational databases.
19. Ability to develop in various programming or scripting languages for analytic purposes (e.g. Python, R, etc.).
20. Advanced knowledge of BI governance including data usage, metadata, data management, data quality, and security.
21. Strong oral and written communication skills including the ability to communicate business and technical concepts and information effectively to a wide range of diverse audiences.
22. Strong interpersonal skills including the ability to work independently and productively with diverse customers, both internally and externally, at various levels and from cross-functional areas.
23. Ability to develop knowledge and understanding of business needs with the ability to establish/maintain high level of customer trust and confidence.
24. Excellent organizational skills and ability to prioritize.
25. Excellent critical thinking and analytical skills.
26. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
27. Ability to maintain confidential information in accordance with policies, guidelines and direction from manager.