

Position #042675

Trust Funds Director (Deputy Director, Office of Enterprise Initiatives)

POSITION SUMMARY

Under general supervision of the Director, this position serves as the Deputy Director of the Office of Enterprise Initiatives (OEI) responsible for execution of operational activities of project management and business analysis services to the organization's enterprise initiatives affecting the entire agency operations and service delivery to approximately 640,000 employees, retirees, and their families, and 1,500 state and local government employers. Decisions made by this position have a large fundamental impact primarily on the information systems of the Department of Employee Trust Funds, and when appropriate the administrative operations.

OEI provides expertise in major and significant program areas including project management, business analysis, process management and change management affecting information technology (IT) and employee/retiree benefits administration systems. The Deputy Director is responsible for directing and prioritizing assigned agency initiatives and leading project management and business analysis capabilities. This position plays a critical role in cultivating a project driven culture across the organization through the development and implementation of initiatives to improve best practices.

The Deputy Director is also responsible for leading and coordinating cross-functional project teams made up of internal and external stakeholders working on Department of Employee Trust Funds (ETF) enterprise initiatives that impact ETF benefit administration and service delivery. In collaboration with the Director, the Deputy Director ensures the allocation of resources necessary for the successful implementation of enterprise initiatives and communicates throughout the Department, as appropriate, the purpose and status of initiatives. The Deputy Director prepares Office annual/bi-annual budget and requests for resources. In addition, the Deputy Director serves as liaison with key stakeholders (e.g., participating employers, members, and boards of trustees) on OEI initiatives and coordinates activities with the Department of Administration's Division of Enterprise Technology (DET), Division of Personnel Management (DPM), and vendors contracted to implement components of each project, as required.

This position is responsible for development of project management and business analysis frameworks, processes, standards, templates, and methodologies to be used on all projects to promote consistency and repetition. In addition, this position develops and manages office staffing allocations, supervises multiple professional positions performing a variety of functions, and manages the Enterprise Project Portfolio to deploy business automation and informational technology (IT); and program processes and procedures necessary to improve operational efficiency and the customer experience in support of the agency's Strategic Plan. The position formulates, determines, and implements policies related to project management and business analysis programs and participates in policy development as part of the Agency Management Council. In addition, this position leads the agency cross-functional Portfolio Committee management group. The Deputy Director develops short-and long-range plans and budgets and represents the agency at internal as well as external meetings of other agencies, governing boards, technology and program administration vendors.

The Deputy Director acts on behalf of the Director in the Director's absence.

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

30% GOAL A: OEI Operations

Worker
Activity

- A.1 Provide consultation to internal and/or external business users on the business services OEI provides and promote utilization of efficient and cost-effective capabilities in business automation and business process.
- A.2 Provide effective project oversight, guidance, and leadership for enterprise projects. Include regular review of work plans and priorities, analysis, design, testing, implementation, written descriptive status reporting, post implementation evaluation, etc.
- A.3 Create, adapt and promote the use of repeatable, consistent, industry-standard project management and business analysis processes/practices, standards and procedures to be consumed by Enterprise technical and application initiatives.
- A.4 Manage Centers of Excellence initiative to integrate use of quality improvement methodologies and tools (such as Six Sigma) into ETF enterprise project teams.
- A.5 Represent management by serving on advisory groups or other stakeholder organizations in response to ETF or state needs.
- A.6 Collaborate with CIO and business leadership on assigned projects to validate the business requirements and design.
- A.7 Provide management, oversight, leadership, coaching and guidance to staff, other managers and distributed staff involved in project management and business analysis positions across the agency.
- A.8 Ensure Business Automation and Enterprise Architecture, and Project Management teams comply with ETF enterprise cyber security standards, policies, processes, and procedures.
- A.9 Assist Director with ensuring solution vendors establish appropriate statements of work, workplans, schedules and milestones and staffing allocations.
- A.10 Assist Director with ensure vendor deliverables meet contract terms, requirements, and specifications for agency-wide initiatives.

45% GOAL B: Enterprise Project Portfolio Management

Worker
Activity

- B.1 Work in conjunction with ETF's Senior Leadership as part of the Portfolio Committee to set project portfolio priorities consistent with ETF's Strategy; utilize appropriate operations guidelines and techniques to avoid conflicts and to respond promptly as issues arise.

- B.2 Review, negotiate, and prioritize new work requests relative to existing team commitments and available capacity to create reasonable work-plans for the team.
- B.3 Collect and provide monthly project status report roll-ups to ETF's Portfolio Committee and Executive Team.
- B.4 Manage project proposal requests. Ensure that new and future projects are documented appropriately and updated within the portfolio.
- B.5 Manage requests for project changes and review with project sponsors and project managers to ensure project changes are warranted and communicated appropriately.
- B.6 In collaboration with CIO and BITS analyze risks that could impact enterprise initiatives. Work with vendor and project teams to develop, execute, communicate, and evaluate contingency and risk reduction plans.
- B.7 Maintain strong working relationships with ETF business users and applications development staff to assure effective communication and to ensure tasks and responsibilities are assigned and being managed.
- B.8 Assess and collaborate with ETF business areas on resources required for successful project implementation.
- B.9 Prepare, implement, maintain and evaluate OEI long-range and short-range business automation project plans in coordination with the Chief Information Officer (CIO)/Bureau of Information Technology Services (BITS) to ensure consistency with enterprise IT architecture and cyber security
- B.10 Maintain portfolio of OEI long-range and short-range project plans to ensure consistency with and relevance to agency program/service delivery goals and objectives.
- B.11 Prepare annual, biennial and project budgets; provide justification to acquire resources, (personnel, software, and hardware) that best meet the needs of the department. Prepare special reports at request of the Director.

20% GOAL C: Management & Supervision of OEI employees

Worker
Activity

- C.1 Comply with the ETF managerial standards at all times.
- C.2 In collaboration with the Director, establish the organization structure; organize and appoint standing or ad-hoc work groups, and teams for the purposes of communication, coordination, executing projects and other special purposes.
- C.3 Evaluate and modify operational staffing level and composition as necessary to meet the Project Portfolio demand.

- C.4 Staff section and plan employee development through recruitment, selection, training, progressing work assignments, performance evaluation, promotion, retention and career path training and addressing disciplinary matters.
- C.5 Lead and inspire, coach and mentor, guide staff within the Office and members of cross-functional teams.
- C.6 Set, plan and assign project team activities and priorities and identify and resolve resource issues.
- C.7 Ensure OEI staff understand the scope of the benefits and service delivery systems ETF uses and/or offers to its customers; and how OEI uses business automation and quality improvement processes to improve quality and efficiency.
- C.8 Ensure all Business Analyst (BA) and Project Management (PM) staff are assigned and complete quality improvement training and use quality improvement concepts and tools in ETF projects.
- C.9 Maintain a team culture of continuous improvement.
- C.10 Promote, implement, and administer appropriate Affirmative Action goals and agency equity and inclusion objectives and priorities.

5% GOAL D: Performance of special assignments, consultation, training, and/or support agency policy and participation in employee development programs.

Worker
Activity

- D.1 Carry out special assignments to respond to the needs of agency management and the divisions/offices.
- D.2 Prepare special reports and recommendations as required.
- D.3 Maintain a program of personnel development through appropriate training, selected reading, conferences, and seminars as attendee and participate to maintain up-to-date knowledge of both technology and best practices related to project management and business analysis.
- D.4 Maintain basic knowledge of all Department internal and external administered programs offered to members of the WRS and be able to recognize potential for improvements through advanced technology or revised/combined systems or configurations.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

1. Strategic, business, budgetary planning techniques, feasibility and cost benefit analysis.
2. Project, program, and portfolio management; business analyst methodologies and standards.
3. Change management techniques and best practices.
4. Large enterprise employee benefit administration practices and procedures.
Quality improvement concepts and methodologies (such as; Six Sigma, Lean, TQM, CQI) including organizational concept of “Centers for Excellence”.
5. Team/Work Group facilitation methods and techniques.
6. Supervisory methods and techniques used in: performance planning and evaluation, mentoring/coaching, goal setting, employee development, succession planning, conflict resolution, and discipline.
7. Informational Technologies and their use in business automation projects.

Skilled in:

8. Using effective leadership and supervisory practices to develop effective working relationships with diverse groups of stakeholders.
9. Effective oral, written and other interpersonal communication techniques to effectively prepare and present complex plans and proposals.
10. Developing/implementing complex project budgets and annual operating budgets.
11. Using quality improvement methodologies and metrics to address complex enterprise-wide projects.
12. Facilitating productive teams and collaborating with both technical and non-technical staff.
13. Leading and motivating staff.
14. Making sound decisions.
15. Providing strategic alignment of organizational priorities.

Ability to:

16. Identify and resolve problems.
17. Work effectively in team environments and secure cooperation and/or agreement in situations where conflicting objectives and opinions exist.
18. Effectively manage large project portfolios involving inter/intra department project teams.
19. Develop and maintain effective working relationships with ETF customers, business, IT, management, and staff at all levels of the organization.
20. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
21. Ability to maintain confidential information in accordance with policies, guidelines and direction from manager.

SPECIAL REQUIREMENTS:

- Project Management Professional (PMP) certification preferred.
- Occasional evening or weekend hours may be required.
- Occasional travel within or out of state may be required.