

Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date

2026-01-02

2. Department

California State Teachers Retirement System

3. Organizational Placement (Division/Branch/Office Name)

Technology Services Branch/BenefitConnect

4. CEA Position Title

Director, BenefitConnect

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

Under the direction of the Chief Technology Officer, the Director, BenefitConnect Platform sets policy for BenefitConnect, CalSTRS' core benefit administration platform, and is accountable for how the platform is governed and used across the organization. The role makes the platform-level decisions that keep BenefitConnect aligned with benefit accuracy, statutory requirements and long-term operational needs.

The Director serves as a policy advisor and internal consultant to the Chief Technology Officer and senior leaders on matters related to the BenefitConnect platform, including governance, business enablement, risk management, and alignment with CalSTRS' strategic and fiduciary responsibilities. When appropriate, the Director supports executive briefings related to BenefitConnect for the Teachers' Retirement Board and external partners.

6. Reports to: (Class Title/Level)

Chief Technology Officer-Career Executive Assignment (CEA) C

7. Relationship with Department Director (Select one)

- Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): As a member of senior leadership, serves as an expert advisor and expert on business-related matters to the CEO, Executive Staff and the Teachers' Retirement Board in relation to their responsibilities and the ongoing implementation of phases of BenefitConnect, CalSTRS pension system.

8. Organizational Level (Select one)

- 1st
- 2nd
- 3rd
- 4th
- 5th (mega departments only - 17,001+ allocated positions)

B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Under the general direction of the Chief Technology Officer (CTO), the Director, BenefitConnect Platform provides leadership and sets policy for BenefitConnect, CalSTRS' core pension administration platform. The role sets clear policy direction for BenefitConnect as a long-term enterprise platform that supports the delivery of retirement, disability, survivor benefits, and other critical member services, rather than as a time-limited project or purely operational system.

The Director establishes and maintains the policies, governance frameworks, and decision criteria that guide how BenefitConnect is configured, enhanced, integrated, and sustained over time. This includes policy direction related to platform stability, business process alignment, customization, data integrity, security, accessibility, vendor use, and lifecycle management. Decisions in these areas have broad organizational impact and directly affect benefit accuracy, statutory compliance, and member trust.

The Director serves as the designated authority for platform-level tradeoffs and risk decisions related to BenefitConnect, operating within established policy direction and escalation thresholds. This includes, for example, determining how enhancement requests are evaluated and prioritized, what level of platform risk is acceptable, when issues require escalation beyond the operational level, and how to balance system stability with ongoing improvements. These decisions frequently span Technology Services, Benefits and Services, and Financial Services, and require authority beyond a traditional management role.

The Director provides policy oversight for how business needs are brought into the BenefitConnect platform. This includes oversight of Business Relationship Management activities to ensure consistent intake, clear translation of business needs into platform decisions, and alignment with established governance standards, while day-to-day business operations and benefit processing remain with the appropriate program areas.

Within a cross-functional organizational structure, the Director provides oversight and guidance to ensure stabilization and transition activities are aligned with platform governance and long-term sustainability goals. The role collaborates with business and technology leaders to identify opportunities for business process redesign, organizational alignment, and effective use of platform functionality, and advises executive leadership on recommended approaches.

In addition, the Director serves as a policy advisor and internal consultant to the Chief Technology Officer and senior leaders on matters related to the BenefitConnect platform, including alignment with CalSTRS' Strategic Plan, risk management, and fiduciary responsibilities. When appropriate, the Director supports executive and Board-level discussions related to BenefitConnect and participates in relevant governance forums to ensure informed decision-making.

B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- Program is directly related to department's primary mission and is critical to achieving the department's goals.
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: CalSTRS' mission is to secure the financial future and sustain the trust of California's educators. The organization provides retirement, disability, and survivor benefits to California's more than 1 million public school educators and their families. The Director, BenefitConnect Platform keeps BenefitConnect governed and sustained so benefits are accurate, timely, and compliant.

Before the implementation of BenefitConnect, CalSTRS relied on a legacy pension administration system that was increasingly difficult and expensive to maintain and required significant manual workarounds. External audit findings also identified control gaps related to member data and contribution reporting, highlighting risks associated with continuing to operate in the legacy environment. These factors made clear the need for a modern pension administration platform that could better support CalSTRS' operational, regulatory, and fiduciary responsibilities.

BenefitConnect is now the core platform supporting benefit administration, employer reporting, member self-service, and benefit calculations. As a result, the focus has shifted from implementing the system to governing and managing it as a core system of record for pension administration. The Director, BenefitConnect Platform is critical in ensuring the platform continues to function reliably, adapts to legislative and regulatory changes, and meets member expectations for timely and accurate information.

Decisions related to how BenefitConnect is governed, configured, and evolved have a direct impact on CalSTRS' ability to administer benefit plans in compliance with applicable laws and regulations. The success of the platform is essential to safeguarding sensitive data, delivering benefits accurately and efficiently, and supporting the long-term sustainability of CalSTRS as a pension system.

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

The Pension Solution Project was CalSTRS' largest and most complex technology modernization effort, undertaken to replace aging pension administration systems with a single, integrated platform. That effort fundamentally changed how CalSTRS administers benefits by establishing BenefitConnect as the system of record for pension administration.

With the completion of major functionality, the organization has moved from project execution to long-term platform ownership. BenefitConnect now supports core pension functions, including benefit calculations, employer reporting, member self-service, and regulatory controls. Decisions related to how the platform is governed, configured, enhanced, and integrated now have lasting, organization-wide impact.

BenefitConnect continues to evolve beyond initial go-live in September 2025 as deferred functionality is deployed and the platform transitions into steady-state operations. This has increased the need for clear and consistent policy decisions related to configuration, enhancements, vendor support, and risk management that extend well beyond the original implementation period. These decisions affect platform stability, compliance, and operational risk across Technology Services, Benefits and Services, and Financial Services.

BenefitConnect supports the administration and payment of approximately \$1.8 billion in member benefits each month, making platform governance decisions materially significant from a fiduciary, compliance, and risk management perspective.

The nature of this work is fundamentally different from the project phase. The organization now faces ongoing decisions that shape how a mission-critical platform operates over its full lifecycle, rather than time-limited project milestones. The scope, ongoing nature, and risk associated with these decisions exceed what can reasonably be absorbed within existing project or operational roles.

The Director, BenefitConnect Platform provides the sustained leadership and accountability needed to govern the platform over time, support consistent decision-making, and ensure CalSTRS can adapt to legislative and regulatory change while maintaining system stability and member trust.

C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

Under the general direction of the Chief Technology Officer (CTO), the Director, BenefitConnect Platform provides leadership and sets policy for BenefitConnect, CalSTRS' core pension administration platform. The role sets clear policy direction for BenefitConnect as a long-term enterprise platform that supports the delivery of retirement, disability, survivor benefits, and other critical member services, rather than as a time-limited project or purely operational system.

The Director establishes and maintains the policies, governance frameworks, and decision criteria that guide how BenefitConnect is configured, enhanced, integrated, and sustained over time. This includes policy direction related to platform stability, business process alignment, customization, data integrity, security, accessibility, vendor use, and lifecycle management. Decisions in these areas have broad organizational impact and directly affect benefit accuracy, statutory compliance, and member trust.

The Director serves as the designated authority for platform-level tradeoffs and risk decisions related to BenefitConnect, operating within established policy direction and escalation thresholds. This includes, for example, determining how enhancement requests are evaluated and prioritized, what level of platform risk is acceptable, when issues require escalation beyond the operational level, and how to balance system stability with ongoing improvements. These decisions frequently span Technology Services, Benefits and Services, and Financial Services, and require authority beyond a traditional management role.

The Director provides policy oversight for how business needs are brought into the BenefitConnect platform. This includes oversight of Business Relationship Management activities to ensure consistent intake, clear translation of business needs into platform decisions, and alignment with established governance standards, while day-to-day business operations and benefit processing remain with the appropriate program areas.

Within a cross-functional organizational structure, the Director provides oversight and guidance to ensure stabilization and transition activities are aligned with platform governance and long-term sustainability goals. The role collaborates with business and technology leaders to identify opportunities for business process redesign, organizational alignment, and effective use of platform functionality, and advises executive leadership on recommended approaches.

In addition, the Director serves as a policy advisor and internal consultant to the Chief Technology Officer and senior leaders on matters related to the BenefitConnect platform, including alignment with CalSTRS' Strategic Plan, risk management, and fiduciary responsibilities. When appropriate, the Director supports executive and Board-level discussions related to BenefitConnect and participates in relevant governance forums to ensure informed decision-making.

C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

CalSTRS operates under the oversight of its Board and is responsible for governing and managing its pension administration technology with a high degree of accountability and risk. Within this environment, the Director, BenefitConnect Platform is delegated authority to make policy-level decisions that govern how the BenefitConnect platform is managed, sustained, and evolved over time.

The Director's decision-making authority is focused on platform governance rather than day-to-day operations. This includes setting policy direction for how enhancement requests are evaluated and prioritized, defining acceptable risk thresholds, establishing escalation criteria, and determining when platform issues require executive-level review. These decisions affect multiple areas, including Technology Services, Benefits and Services, and Financial Services, and have a direct impact on benefit accuracy, compliance, and member trust.

The Director provides leadership and policy guidance to ensure business processes align with platform capabilities and governance standards. This authority supports consistent, organization-wide decision-making related to platform configuration, integration, and change, while execution and operational ownership remain with the appropriate business and technology teams.

The Director also serves as a policy advisor to the Chief Technology Officer and senior leadership on matters related to BenefitConnect governance, platform risk, and long-term sustainability, and supports executive and Board-level discussions when platform decisions intersect with CalSTRS' strategic objectives and fiduciary responsibilities.

As a member of senior leadership, the Director, BenefitConnect Platform participates in organizational governance forums to provide policy input and decision support related to the BenefitConnect platform. This includes participation in relevant technology and pension governance bodies to ensure platform decisions are aligned with organizational priorities, risk management expectations, and fiduciary responsibilities.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

This position will both create new policy and apply existing policy. New policy is needed to define how BenefitConnect is governed as a standing enterprise platform, including who decides what, how issues are escalated, how configuration and customization are handled, and how vendors and upgrades are managed.

The role also interprets existing statutes, regulations, Board policy, and internal standards and applies them to specific platform decisions. That includes translating new laws and Board direction into concrete changes in the platform, aligning configuration and controls with existing benefit and compliance rules, and making sure Technology Services, Benefits and Services, and Financial Services follow the same governance approach when they use the platform.