

## DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits & Services		POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 434 - 5393 - xxx
DIVISION/UNIT Service Retirement/Training & Communications Team		CLASS TITLE Associate Governmental Program Analyst
INCUMBENT NAME VACANT		WORKING TITLE SR Associate Training & Communications Analyst
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 direction of the Pension Program Manager I, the incumbent independently performs the more responsible, varied, and complex technical and analytical duties to provide the best possible service to our internal and external customers and ensure members receive timely and accurate benefit payments.		
% 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.	
	<b>ESSENTIAL FUNCTIONS</b>	
25%	<u>Process Review, Documentation &amp; Improvement:</u> Partner with subject matter experts on each team within SR to learn their specific business functions (often the most complex SR functions), processes and procedures to verify procedures are documented as performed. Independently review the procedures and processes to ensure they are clear, thorough and understandable. Proactively look for ways to develop and present process improvement alternatives and recommendations to leadership for consideration and, if adopted, leads the implementation effort and related training. Ensure process improvements are in compliance with applicable guidelines. Participate in Pension Solution activities, including system testing.	
25%	<u>Training:</u> Independently develop and deliver training curriculum in a formal classroom setting or informal on-the-job training; vets training issues with subject matter experts. Stay abreast of current trends in adult learning principles. Ensure that the most appropriate methodologies are being used to deliver training to employees. Develop training feedback documentation to evaluate training effectiveness and identify and implement process and training improvements. Play a key role in developing a division training plan and calendar that aligns with organizational goals and priorities. Track class and informational meeting attendance and follows up to ensure absent staff are updated appropriately. Follow-up with trained staff to ensure they received a clear understanding of the taught skill or knowledge. Play a significant role in the knowledge transfer process throughout SR; work as the liaison when workloads are moved from one individual to another to ensure that the knowledge transfers thoroughly to the person who will be performing task in the future. Lead the effort in training curriculum maintenance and consistent reflection of the most complete and accurate information. Independently review existing training modules and job aids for completeness and accuracy. Ensure that there is centralization of SR training material (documents, processes, job aids, etc.). Partner with peers throughout the organization to ensure SR staff receive timely, effective learning opportunities on all business, technical, procedural, legislative, and system changes. Identifies opportunities for program and staff development; makes formal and/or ad hoc presentations to leadership, client groups or CalSTRS business partners.	
20%	<u>Customer Service:</u> Respond timely and professionally both verbally and in writing to internal and external inquiries related to Training and Communications; develop rapport with peers in and outside of SR; coordinates with program area staff to ensure development, dissemination and application of consistent and accurate information, procedures and seamless service to CalSTRS customers; supports SR's onboarding, engagement, and recognition programs.	
15%	<u>Quality Control:</u> Ensure accurate and timely retirement benefits through monitoring and quality control of work assignments and inventory; carefully follows established processes and procedures to ensure efficiency and accuracy; routinely perform quality control review of Training and Communications Team staff deliverables; acquire system knowledge to develop the expertise necessary to perform training and communications tasks to ensure consistency with established laws, policies and regulations.	

10%	<p><u>Communications/Publications</u>: Review proposed Service Retirement publication modifications, letters, forms and web materials for accuracy and consistency; act as a resource person and provide technical support to technical staff, analysts, and leadership.</p> <p><b>MARGINAL FUNCTIONS</b></p>
5%	<p><u>Team Lead</u>: May act as the lead when the manager is not available and represent the team on the highest-visibility and highest-risk cross-functional projects, reporting back to the team and SR leadership as necessary; maintain thorough subject-matter expertise.</p> <p><u>Team Participation</u>: Serve as a resource/team member on cross functional teams to establish and maintain timely and accurate payment of benefits in support of the Service Retirement Mission and Vision.</p>

**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:

- Analytical Thinking
- Creative Thinking
- Ethics and Integrity
- Forward Thinking
- Managing Work
- Organizational Awareness
- Planning and Organizing
- Technical/Professional Knowledge and Skill
- Thoroughness
- Written Communication

**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

**Service Retirement Vision**: Lead the way with stellar service, support of people and a culture of innovation and excellence.

**Service Retirement Mission**: Establish and maintain accurate and timely Service Retirement benefits.

**WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB**

WORK ENVIRONMENT

- Prolonged periods of sitting.
- Work in a high-rise building in an open space environment.

PHYSICAL ABILITIES

- Ability to use a computer several hours a day.
- Ability to lift up to 15 pounds.

815-434-5393-xxx

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



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

# DUTY STATEMENT

EFFECTIVE DATE

BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 434 - 5157 - 024
DIVISION/UNIT Service Retirement/ Training & Communications	CLASS TITLE Staff Services Analyst
INCUMBENT NAME VACANT	WORKING TITLE Training & Communications Analyst

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 supervision of the Pension Program Manager I, the incumbent will perform a wide range of technical and analytical duties to provide the best possible service to our internal and external customers and ensure members receive timely and accurate benefit payments.

% 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.
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35%	<p><b>ESSENTIAL FUNCTIONS</b></p> <p><u>Training:</u> Develop and deliver training curriculum in a formal classroom setting or informal on-the-job training; vet training issues with subject matter experts. Ensure that the most appropriate methodologies are being used to deliver training to employees. Develop training feedback documentation to evaluate training effectiveness and identify and implement process and training improvements. Support development of a division training plan and calendar that aligns with organizational goals and priorities. Track class and informational meeting attendance and follow up to ensure absent staff are updated appropriately. Follow up with trained staff to ensure they received a clear understanding of the taught skill or knowledge. Play a significant role in the knowledge transfer process throughout Service Retirement (SR); work as the liaison when workload is moved from one individual to another to ensure that the knowledge transfers thoroughly to the person who will be performing the task in the future. Support training curriculum maintenance and consistent reflection of the most complete and accurate information. Review existing training modules and job aids for completeness and accuracy. Participate in the centralization of training material (documents, processes, job aids, etc.). Partner with peers throughout the organization to ensure SR staff receive timely, effective learning opportunities on all business, technical, procedural, legislative, and system changes. Identify opportunities for program and staff development; make formal and/or ad hoc presentations to leadership, client groups or CalSTRS business partners.</p>
30%	<p><u>Process Review, Documentation &amp; Improvement:</u> Partner with subject matter experts on each team within SR to learn their specific business functions, processes and procedures to verify procedures are documented as performed. Review the procedures and processes to ensure they are clear, thorough and understandable. Develop and present process improvement alternatives and recommendations to leadership for consideration and, if adopted, be involved in the implementation effort and related training. Ensure process improvements are in compliance with applicable guidelines. Participate in Pension Solution activities, including system testing.</p>
20%	<p><u>Customer Service:</u> Respond timely and professionally both verbally and in writing to internal and external inquiries related to Training and Communications. Develop rapport with peers in and outside of SR. Coordinate with program area staff to ensure development, dissemination and application of consistent and accurate information, procedures and seamless service to CalSTRS customers. Support SR’s onboarding, engagement, and recognition programs.</p>
10%	<p><u>Strategic Analysis and Support:</u> Serve as a resource/team member on cross-functional teams in support of the Service Retirement vision and mission. Develop rapport and business partnerships with colleagues in SR, CalSTRS and other agencies. Provide input and reporting to be used for business decisions such as resource planning. Stay current on laws, rules and regulations applicable to SR business functions in order to partner with others to recommend courses of action that ensure our communications, processes, procedures and training remain compliant. Coordinate with program area staff to ensure development, dissemination and application of consistent and accurate information, procedures and seamless service to CalSTRS customers. Analyze data and communicate with leadership on policies and program alternatives to achieve increased productivity and improved consistency and accuracy within SR. Stay abreast of SR trends and provide input for strategic and business planning. Keep leadership apprised of perceived and identified obstacles with work assignments.</p>

**MARGINAL FUNCTIONS**

5%

Change Agent: Act as a resource within SR—supporting our Change Management Ambassador— to provide information and tools to the division to better prepare them for the changes that are happening due to our Pension Solution.

Quality Control: Ensure accurate and timely retirement benefits through monitoring and quality control of work assignments and inventory; carefully follows established processes and procedures to ensure efficiency and accuracy; routinely performs quality control review of Training and Communications Team staff deliverables; acquires system knowledge to develop the expertise necessary to perform training and communications tasks to ensure consistency with established laws, policies and regulations.

**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:

- Analytical Thinking
- Decision Making
- Diagnostic Information Gathering
- Ethics and Integrity
- Initiative
- Managing Work
- Technical/Professional Knowledge and Skill
- Thoroughness

**CONDUCT AND ATTENDANCE EXPECTATIONS**

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
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**WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB**

WORKING CONDITIONS

- Prolonged periods of sitting.
- Work in a high-rise building in an open space environment.

PHYSICAL ABILITIES

- Ability to use a computer several hours a day.
- Ability to lift up to 15 pounds.

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.).

815-434-5157-024

**To be reviewed and signed by the supervisor and employee:**

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SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

**EMPLOYEE'S STATEMENT:**

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EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED