



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

# DUTY STATEMENT

EFFECTIVE DATE
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BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 437 - 4864 - 021
DIVISION/UNIT Customer Service / Learning and Quality Assessment / Training	CLASS TITLE Pension Program Manager I
INCUMBENT NAME	WORKING TITLE Customer Service Training Manager

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.

Customer Service (CS) is the first point of contact for CalSTRS’ members, benefit recipients, and other constituents. Through multiple communication channels which include telephone, secure messaging, and written correspondence, Contact Center Analysts are responsible for providing excellent member service through accurate, consistent, complete, and timely responses to each inquiry. CS is also responsible for transactional processing of various forms and documents. The Training Team within the Learning & Quality Assessment Unit is responsible for the training program of Contact Center analysts in preparation of taking on this vital role which is essential to CalSTRS’ mission and purpose.

Under the general direction of the Learning & Quality Assessment Section Manager, the Training Manager leads, plans, organizes, and directs the performance of a team of analysts serving as trainers for the division.

% 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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<b>ESSENTIAL FUNCTIONS</b>	
35%	<u>Employee Performance, Development, &amp; Engagement.</u> Serve as a role model for staff by consistently demonstrating the CalSTRS core values and competencies and adhering to the organization’s leadership expectations. Build an effective work team to achieve the division’s service goals; recruit new staff members who exhibit CalSTRS’ core values and competencies; communicate clear expectations aligned with organizational objectives; convey individual performance results in scheduled and ad hoc one-on-one discussions; provide timely, constructive feedback and coaching that promotes professional growth, improves performance, and builds competency; and celebrate individual and team performance improvements. Timely identify, address, and document poor staff performance; collaborate with Human Resources on performance issues; develop and monitor formal corrective action plans with under-performing staff; and adhere to CalSTRS Human Resources policies. Maintain employee performance documentation consistent with division guidelines; complete thorough and timely probationary reports and annual evaluations; create, monitor, and refresh Individual Development Plans (IDP) per staff request; and supports and tracks staff development.
30%	<u>Training Delivery.</u> Lead the CS training program and provide direction to staff who deliver training in a manner that conforms to the evolving needs of the division through training methods including but not limited to classroom training, individual interaction, and e-learning. Using the ADDIE instructional systems design model, deliver participant-centered curriculum that aligns employee performance with organizational goals; create a standardized, consistent learning experience for all students through detailed participant and leader guides and regular evaluation of trainer classroom performance; ensure new employee training (NET) curriculum is maintained and consistently reflects the most complete and up-to-date information; supervise new employees during initial NET classroom training; and partner with the division’s leadership team managers to transition NET students to their role.
15%	<u>Learning Assessment.</u> Evaluate training effectiveness and implement improvements to ensure curriculum is aligned with organizational expectations. Conduct follow-up studies of completed training to evaluate and measure results. Maintain a keen understanding of training trends, developments, and best practices. Evaluate learning outcomes using Kirkpatrick’s levels of training assessment including trainee performance on post-training QA reviews; identify performance gaps and continually adjust training to achieve desired results; closely collaborate with the Quality Assurance Manager and the Research & Communications Manager to ensure curriculum, agent response guides, and knowledge base tools are aligned.

15%

Learning Management. Create a division training plan and calendar that aligns with organizational goals and priorities. Coordinate with CalSTRS Training Services to conduct annual learning needs assessments; recommend training solutions to meet identified skill or knowledge gaps; and collaborate with other CS managers to analyze staff performance gaps and recommend appropriate remedial interventions.

**MARGINAL FUNCTIONS**

5%

Project Team Participation. May lead or participate on cross-functional and division process improvement teams. Professionally represents CS and effectively communicates CS' perspective; defines tasks and milestones to achieve project objectives; develops more effective and efficient methods to accomplish tasks; works cooperatively with others to produce innovative solutions; anticipates possible problems; develops and communicates recommendations for resolution; and provides regular project updates to CS leadership and staff.

**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:

- Change Leadership
- Conflict Management
- Decision Making
- Developing Others
- Empowering Others
- Ethics and Integrity
- Managing Work
- Planning and Organizing
- Risk Management
- Team Leadership
- Vision and Strategic Thinking

**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

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

- Work hours may be various, such as weekends, evenings, and holidays
- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard/mouse and read from computer screens for several hours a day
- Ability to move up to 10 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.).

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

815-437-4864-021

**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

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BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 437 - 4800 - XXX
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INCUMBENT NAME	WORKING TITLE Customer Service Training Manager

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