



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 5393 - 905
DIVISION/UNIT Retirement Readiness / Training Services	CLASS TITLE Associate Governmental Program Analyst
INCUMBENT NAME	WORKING TITLE Training and Educational 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.

The Retirement Readiness Division (RR) is the principal area of the organization that develops, delivers and coordinates educational services to CalSTRS members, employers and staff. The goal of the RR is to ensure that all members receive adequate, timely and accurate information to make sound decisions regarding their CalSTRS benefits.

Under the direction of the Pension Program Manager I, Training Services, the Associate Governmental Program Analyst is responsible for independently performing the more complex research, analysis, design, development, evaluation, and delivery of member, support staff and Benefits Specialist training.

% 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.
-----------------------------	--

ESSENTIAL FUNCTIONS	
35%	<p>Deliver training: Independently conduct the more complex training needs assessments as well as audience, task, and media analysis to determine learning objectives, methodology and appropriate delivery medium for each class. Establish training plans and quality standards that support the RR strategic goals.</p> <p>Conduct training sessions for Benefits Specialists, CalSTRS staff and constituent groups. Conduct training classes and workshops for active and retired members in coordination with internal and external Benefits Specialists.</p>
30%	<p>Curriculum Development: Independently design, develop and implement educational programs intended to instruct Benefits Specialists and staff on appropriate methods and procedures for scheduling sessions and educating CalSTRS members on their retirement decisions. Such training may be in the form of on-site and remote instruction – classroom, web-based, or simulation – using recognized instructional methods.</p>
20%	<p>Evaluation: Evaluate training delivery and staff knowledge using recognized evaluation methods to ensure quality of services. Produce reports and recommend program improvements and modifications when and where necessary. Support staff and management by providing timely and specific formal feedback in the form of reports and coaching sessions.</p>
10%	<p>Technical Assistance: Monitor and respond to the Benefits Planning Feedback mailbox and Benefits Specialist’s support line. Provide technical guidance, direction and ongoing program support to the staff who conduct Benefits Planning sessions and CalSTRS workshops using extensive knowledge of CalSTRS laws, policies, procedures, and programs. Prepare and maintain program documentation, such as issue papers, procedure documents, job aids, etc.</p>
MARGINAL FUNCTIONS	
5%	<p>Perform research and development of innovative ways to deliver services to CalSTRS members. Review and provide input on draft products to present clear and concise information to clients or other interested parties regarding the technical complexities of RR programs and projects. Provide Benefits Planning services to CalSTRS members. Make presentations to management, staff and field Benefits Specialists on the RR training program.</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

- Analytical Thinking
- Creative Thinking
- Ethics and Integrity
- Forward Thinking
- Managing Work
- Organizational Awareness.
- Planning and Organizing
- Technical/Professional Knowledge and Skills
- 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
- Handle matters of extreme sensitivity while ensuring confidentiality

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Work in a high-rise building, in an open space environment.
- Office setting with low partitions.
- Ability to use a computer keyboard and read from computer screens several hours a day.
- In-State travel required up to 25% with occasional overnight travel.
- Work hours may be various, such as shift work, weekends, evenings and holidays.
- Ability to move tables and chairs for multiple conference room configurations.
- Ability to lift laptop, portable printer, portable projector for use in and out of the Member Service Center.

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



PROPOSED
 CURRENT

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 5157 - XXX	
DIVISION/UNIT Retirement Readiness Division/Training Services	CLASS TITLE Staff Services Analyst	
INCUMBENT NAME Vacant	WORKING TITLE Training and Educational 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.		
The Retirement Readiness (RR) Division is the principal area of the organization that develops, delivers and coordinates educational services to CalSTRS members, employers and staff. The goal of the RR is to ensure that all members receive adequate, timely and accurate information in order to make sound decisions regarding their CalSTRS benefits.		
Under the direction of the Training Services Pension Program Manager I, the Staff Services Analyst (SSA) is responsible for the research, analysis, design, development, evaluation, and delivery of member, support staff and benefits specialist training. This position may require 5% travel.		
% 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.	
	ESSENTIAL FUNCTIONS	
35%	<p>Deliver training: Conduct training needs assessments as well as audience, task, and media analysis to determine learning objectives, methodology and appropriate delivery medium for each class. Establish training plans and quality standards that support the RR strategic goals.</p> <p>Conduct training sessions for Schedulers and Support Staff. Assist with the training of Benefits Specialists at the apprentice level. Conduct training classes and workshops for active and retired members in coordination with internal and external Benefits Specialists.</p>	
30%	<p>Curriculum Development: Design, develop and implement educational programs intended to instruct Schedulers, telephone support staff and Field Support Staff on appropriate methods and procedures for scheduling sessions and educating CalSTRS members on their retirement decisions. Such training may be in the form of on-site and remote instruction – classroom, web-based, or simulation – using recognized instructional methods.</p>	
15%	<p>Evaluation: Evaluate training delivery and staff knowledge using recognized evaluation methods to ensure quality of services. Produce reports and recommend program improvements and modifications when and where necessary. Support staff and management by providing timely and specific formal feedback in the form of reports and coaching sessions.</p>	
15%	<p>Technical Assistance: Monitor and respond to basic questions (production timelines, service credit breakdown requests, imaging questions, etc.) in the Retirement Readiness Resource mailbox. Provide direction and ongoing program support to the staff who conduct Benefits Planning sessions and CalSTRS workshops using knowledge of the CalSTRS Member Handbook, policies, procedures, and programs. Prepare and maintain program documentation, such as issue papers, procedure documents, job aids, etc.</p>	
	MARGINAL FUNCTIONS	
5%	<p>Assist in the research and development of innovative ways to deliver services to CalSTRS members. Review and provide input on draft products to present clear and concise information to clients or other interested parties regarding the technical complexities of RR programs and projects. Provide scheduling and support services to CalSTRS members. Make presentations to management, staff and field Benefits</p>	

Specialists on the RR training program.

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 Skills
- Thoroughness

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

- Prolonged periods of standing, bending, sitting, kneeling.
- Occasional overnight travel.
- Work in a high-rise building, in an open space environment.
- Office setting with low partitions.
- Work hours may be various, such as shift work, weekends, evenings and holidays.
- Ability to use a computer keyboard several hours a day.
- Read from computer screens several hours a day.
- Ability to move tables and chairs for multiple conference room configurations.
- Ability to lift laptop, portable printer, portable projector for use in and out of the Member Service Center.

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

