

## DUTY STATEMENT

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| BRANCH<br>Benefits and Services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | POSITION NUMBER (Agency – Unit – Class – Serial)<br>815 - 430 - 4800 - 001                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |
| DIVISION/UNIT<br>Employer Services / Training and Development                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS TITLE<br>Analyst III                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |
| INCUMBENT NAME<br>Vacant                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | WORKING TITLE<br>Training Specialist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                |
| 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                |
| <p>Under general direction of the Supervisor I, the Analyst III serves as the Training Specialist and Subject Matter Expert (SME) in training and communication strategies and project management methodologies for the Employer Services Division. The incumbent regularly handles the more responsible, varied, and complex analytical and consultative duties. This includes coordinating with other analysts and subject matter experts, managing projects, and providing guidance to leadership and stakeholders on developing and researching training strategies. The Analyst III is expected to analyze, plan, and evaluate training programs and initiatives, and deliver recommendations that support organizational goals and priorities.</p> <p>This position may require travel 15% to 25% of the year to conduct training analyses and engage with stakeholders.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                |
| % 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                |
| 35%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>ESSENTIAL FUNCTIONS</b><br>Collaborate and lead discussions with systems analysts and SMEs regarding SEW, Benefit Connect, ELC, and related systems. Conduct complex analysis to identify inconsistencies in training curriculum and implement updates to training materials based on system changes, legislative impacts and emerging business needs. Lead consultations with internal and external stakeholders to assess training needs, identify gaps in existing materials, and develop innovative solutions. Serve as the training SME for system(s) functionality; independently test system features and validate that functionalities meet current standards and operational requirements. Ensure the Training and Development unit is informed on system changes and equipped to provide accurate information to internal and external stakeholders. Apply advanced project management methodologies to support the development of all training materials and curriculum for ES. Develop, design and deliver training related to systems such as BenefitConnect, SEW, and TRL concepts that influence employer and internal operations. Apply change management principles to communicate changes to leadership and the Division.                                                        |                |
| 35%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Independently perform advanced and complex research regarding training concepts and employer publications; monitor general trends and advances in adult learning principles in support of course development. Conduct strategic outreach and provide consultative guidance to internal and external stakeholders to develop employer publication and communication plans. Evaluate current and emerging training delivery formats, technologies and methodologies to provide data-supported recommendations to leadership for implementation. Develop, design and deliver Division training courses for e-learning and instructor-led training that align with organizational goals and priorities. Review and provide quality assurance oversight on training designs completed by Training Analysts; identify issues and recommend or guide corrective actions. Assess whether learning objectives are met, designs are consistent with CalSTRS brand and accessibility standards, as well as meet adult learning principles. Serve as the Division SME on accessibility standards, technology and troubleshooting. Monitor and manage training development timelines and coordinate with Training Analyst to ensure deadlines are met and curriculum is de for internal and external stakeholders. |                |
| 25%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Serve as the SME on the Learning Management System (LMS) tool, utilized to manage e-training for internal and external stakeholders. As the LMS Administrator, and manage all tasks related to the tool, including design, testing functionality, troubleshoot, and resolve user issues and working with CalSTRS Technology Service to resolve technical problems. Compile, maintain and analyze LMS data, and reports, apply advanced analytical methods to identify trends and communicate performance metrics to leadership. Collect and analyze all training related metrics and present findings to ES leadership and Executive staff;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |

provide recommendations to enhance the LMS related training process, reporting and user experience. Create and present ad hoc statistical and narrative reports as needed to support division decision-making..

5%

**MARGINAL FUNCTIONS**

May coordinate and conduct training activities for internal and external stakeholders. May act on behalf of the Supervisor I in their absence. May participate on special project teams.

**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 located in the [Competency Guide](#) on Central.

**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
- Support and model CalSTRS Core Values

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

- Occasional travel to various locations for training and/or meetings
- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens 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:**

**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