

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 5157 - 905	
DIVISION/UNIT Retirement Readiness / NorCal Member Service Centers	CLASS TITLE Analyst I	
INCUMBENT NAME VACANT	WORKING TITLE CalSTRS NorCal Benefits 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.		
Under the supervision of the Member Service Center (MSC) Manager, Supervisor II, the CalSTRS Benefits Specialist performs duties of average difficulty for the less complex assigned areas associated with providing retirement benefits planning. The incumbent must exercise a high degree of discretion, diplomacy, confidentiality and initiative while taking action to resolve issues as they arise. The position is in West Sacramento and may require up to 50% 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% <u>Front Counter:</u> Under the supervision of the manager, travel as needed to provide front counter support at the NorCal MSCs (Fresno, West Sacramento and Santa Clara). Assist active, inactive and retired CalSTRS members and survivors on a walk-in basis at the front counter. Access member information using CalSTRS databases to answer questions regarding the various benefits available to them regarding the CalSTRS hybrid retirement system. Review forms for accuracy and contact other business units as appropriate to assist with inquiries. 35% <u>Benefits Planning:</u> Under supervision, conduct individual and group retirement benefits planning interviews with CalSTRS members in person and virtually, according to Retirement Readiness (RR) standards and procedures; interpret, and accurately explain the California Education Code, policy memos, administrative directives, management memoranda, CalSTRS benefits and a range of CalSTRS programs to a membership of varying degrees of program understanding; access CalSTRS systems to retrieve, research and analyze member data to properly prepare for counseling interviews and ensure the accuracy of information provided. Utilize computer programs to determine retirement benefit calculations based on specific member information such as estimated retirement date, option beneficiaries, unused sick leave balances, final compensation, etc. 15% <u>Group Presentations:</u> Under supervision, assist with group presentations virtually and in-person throughout the Northern California Region, including at Member Service Centers located in Santa Clara, Fresno, and West Sacramento and in groups ranging from 15 – 100 individuals. 10% <u>CalSTRS Outreach:</u> With support, assist with school site visits and coordinate the development and compilation of presentation materials. Follow-up with campus administrators and support staff to successfully achieve CalSTRS on outreach objectives. As directed partner with school campuses to effectively promote CalSTRS on-site visits utilizing flyers, handouts, posters, and email notifications. Promote CalSTRS member education opportunities to active teachers through school site visits and education related conferences as appropriate.	
	MARGINAL FUNCTIONS 5% Participate as a team member with other CalSTRS staff in research and development innovations and special projects that have substantial departmental impact. Represent the division or branch on cross-functional project teams. Analyze business area needs, define business processes and develop necessary procedures. Provide assistance to RR training team in the development or updating of workshops.	

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

- Travel up to 50% of the time including occasional overnight in state travel
- Work onsite Monday – Friday, hours may be various as applicable to meet MSC office and business needs.
- Prolonged periods of standing or sitting
- Office setting with low partitions
- Ability to use a computer keyboard/mouse and read from computer screens for several hours a day
- Ability to talk on the telephone for extended periods using a headset
- Ability to move up to 25 pounds
- 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