CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

☐ PROPOSED

☒ CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 866 - 4801 - 001
DIVISION/UNIT Retirement Readiness / Irvine Member Service Center (MSC)	CLASS TITLE Supervisor II
INCUMBENT NAME	WORKING TITLE Member Service Center 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.

Under the general direction of the CalSTRS Southern Regional Manager, Manager II and while working with division management team of Retirement Readiness (RR), the Member Service Center Manager (Supervisor II) is responsible for the oversight and operational activities which include monitoring the quality of services, quantity of benefit planning sessions and workshops, monitoring service levels through analyzing performance metrics and survey data, and ensuring that the CalSTRS culture is maintained in the Irvine MSC and other satellite offices throughout the Irvine region. This position is in Irvine and requires up to 30% travel. Duties include the following and are not limited to:

% 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%	Plan, organize, and direct all activities of the benefits planning program within the Irvine region. Supervise professional and technical staff, establish work assignments, make recommendations and provide directions. Supervise and oversee staff responsible for providing information to members regarding the Pension2 Program. Provide support and guidance for the Pension2 Program. Evaluate work performed in the office and in the field and provide corrective training or assistance. Establish goals and objectives and develop standards of work evaluation. Reorganize job responsibilities, assignments and work schedules. Handle or follow through with staff on matters of extreme sensitivity, complexity, or items that may pose potential harm to CalSTRS. Determine staff development and training requirements to ensure MSC staff and maintain appropriate skill levels to accomplish assigned duties and workload. Communicates and incorporates new program assignments into the office operations by developing processes or methods, establishing goals, objectives, and job performance expectations in alignment with other MSCs and division goals including CalSTRS Pension2.
25%	Manage highly sensitive and complex special projects and special project teams assigned to the Irvine MSC. Incorporate new program assignments into office operations by developing procedures or methods, interpreting and implementing standards, policies, rules, laws and regulations. Attend scheduled management meetings and help upper management while maintaining open lines of communication with all levels of staff. Establish and maintain effective relationships with stakeholders in alignment with the CalSTRS and RR Strategic and Business Plans.
20%	Actively contribute during the RR management strategic and business planning sessions. Ensure that projects identified in the division's annual plan and other key objectives and business initiatives are achieved. Oversee the revision of standards and procedures affecting the operation of the Irvine MSC. Manage the annual budget for the Irvine MSC and acquire the appropriate staff and equipment necessary to carry out the mission of the MSC office. Responsibility for the triage and coordination of Irvine MSC and satellite locations for facility needs as they arise, working with all appropriate parties.
15%	Represent CalSTRS at meetings with employer and employee groups. Make presentations, provide information, interpret policies, respond to inquiries, and resolve issues by providing specific answers to high level and complex issues. Interprets retirement policies, laws, rules and regulations, and provides information or guidance on matters affecting the retirement system.

5%	**MARGINAL FUNCTIONS** Act on behalf of the Southern Regional Manager when absent. Represent at the RR meetings with other CalSTRS divisions, business areas, Executive Staff and the CalSTRS Board.

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

- Prolonged periods of standing, bending, sitting, or kneeling
- Travel required up to 30% with occasional overnight travel
- Work in a high-rise building, office setting with low partitions in an open space environment
- Ability to use a computer keyboard and mouse and read from computer screens several hours a day.
- Move up to 25 pounds.
- Work hours may be various, such as shift work, weekend, 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
- Ability to talk on the telephone for extended periods using a headset.

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