

DUTY STATEMENT

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| | | EFFECTIVE DATE |
| BRANCH Benefits and Services | POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 430 - 5104 - 030 | |
| DIVISION/UNIT Member Account Services/Quality Management | CLASS TITLE Associate Pension Program Analyst (APPA) | |
| INCUMBENT Vacant | WORKING TITLE Associate Pension Program 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. | | |
| Under the general direction of the Pension Program Manager I (PPM), the Associate Pension Program Analyst (APPA) performs a range of full journey level assignments requiring analytical skills and effective written and verbal communication skills. | | |
| % 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. <i>(Use additional sheet if necessary)</i> | |
| 35% | ESSENTIAL FUNCTIONS Subject matter expert in the areas of the Teachers' Retirement Law and California Code of Regulations that Member Account Services has responsibility to administer, including creditable compensation, creditable service and membership. Serve as the primary contact for Executive Staff, management, staff, school employers and stakeholders regarding the Teachers' Retirement Law and California Code of Regulations. Respond to inquiries from other governmental agencies, including the Legislature and Governor's Office. Review employer documentation for compliance with the Teachers' Retirement Law and California Code of Regulations. Maintain a working knowledge of the Secure Employer Website, corporate database, Contribution Account Portal and other related systems. | |
| 35% | Independently research and analyze laws, regulations, and procedures in order to ensure all training materials are consistent with the Teachers' Retirement Law, regulations, and procedures. Develop and maintain all training materials for internal staff and school employers including materials on the Secure Employer Website. Deliver training to division staff, other CalSTRS business areas, school employers and other stakeholders. Maintain training curriculum in order to properly identify training objectives and desired outcomes. Refine, revise, and maintain training curriculum in order to properly identify training objectives, delivery mechanisms, desired outcomes, and appropriate course length. In state travel may be required as needed. | |
| 25% | Develop new procedures and job aids, and recommend changes to existing procedures and job aids based on the Teachers' Retirement Law, regulations, system changes and division objectives. Maintain working knowledge of the division's procedures. Conduct annual review of all procedures and job aids for compliance with laws and regulations. Maintain conformity with the approved format, and version control for procedures and job aids. Maintain Information Security Office standards for all training materials and presentations. | |
| 5% | MARGINAL FUNCTIONS May participate in departmental special projects and may act on behalf of manager in his or her absence or other duties as required. | |
| ADDITIONAL INFORMATION | | |

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. Understanding and demonstration of these additional competencies supports the associate-level analyst's daily performance:

- Analytical Thinking
- Creative Thinking
- Ethics & Integrity
- Forward Thinking
- Managing Work
- Organizational Awareness
- Planning & Organizing
- Technical/Professional Knowledge & Skills
- Thoroughness
- Written Communication

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED OF THE JOB:**WORK ENVIRONMENT**

- Office setting with low partitions. Open floor plan.
- Must be able to work in a high-rise building.

PHYSICAL ABILITIES

- Move up to 15 pounds.
- Ability to sit and work at a workstation for frequent portions of the day.

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation. This will be accomplished by working with Human Resources to ensure federal or state laws and rules and CalSTRS' policies and processes are adhered to by staff. Responsible for taking a pro-active approach in preventing Human Resources or Equal Employment Opportunity Program policy or process issues by responding appropriately to employee concerns by elevating potential EEO or HR issues to the appropriate personnel. 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

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

PERSONNEL ANALYST'S NAME (Print)

PERSONNEL ANALYST'S SIGNATURE

DATE