

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 437 - 5104 - 034	
DIVISION/UNIT Customer Service / Training Team	CLASS TITLE Associate Pension Program Analyst	
INCUMBENT Vacant	WORKING TITLE Senior Trainer	
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>Customer Service is the first point of contact for CalSTRS' members, benefit recipients, and other constituents. Through multiple communication channels which include telephone, secured messaging, and written correspondence, Contact Center Agents and Analysts are responsible for providing excellent member service through accurate, consistent, complete, and timely responses to each inquiry.</p> <p>Under the general direction of the Customer Service Training Manager (Pension Program Manager I), the Senior Trainer develops and delivers initial and ongoing skills-based training that results in retention and effective application of training content.</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. (Use additional sheet if necessary)	
	ESSENTIAL FUNCTIONS	
35%	<p><u>Classroom Training.</u> Responsible for delivering training curriculum in a classroom setting. Uses adult learning principles to create and maintain an engaging learning environment with the outcome of increased retention of training content. Plans ahead and organizes resources for each training class; works with classroom guest speakers to prepare them for the audience and provides necessary feedback to strengthen quality and delivery of material; prepares and executes contingency plans to work around any technical or logistical problems; thoroughly studies trainers' notes prior to each class and personally prepares for training delivery; collaborates and coordinates with co-trainer(s) to ensure a seamless training experience. Manages the classroom experience to build trainee competency and improve job performance; ensures the learning environment is open and collaborative and aligned with CalSTRS' mission, vision, and values; shares knowledge and resources and encourages the same of others; continually assesses trainees' comprehension and adjusts training plan on-the-fly to meet the needs of each specific class; recognizes differences of opinion, brings them out into the open for discussion, and looks for win-win solutions; uses appropriate interpersonal styles and methods to reduce tension and address conflict. Serves as a role model to trainees and actively supports leadership expectations and guidelines; despite own viewpoints and opinions, confidently conveys key leadership and organizational messages and integrates them into the learning experience; helps participants see the bigger picture related to what is being taught in class; recognizes the potential benefits of change and acts as a change leader by helping trainees deal with the effects of change. Assesses trainee progress and documents it in training reports; meets with the Customer Service Engagement Manager to convey trainee performance and discuss any follow-on support needed to solidify learning. Demonstrates command of all subject matter and acts as a resource for less experienced Trainers. Establishes and maintains positive working relationships with internal and external customers.</p>	
20%	<p><u>Instructional Design.</u> Independently develops and delivers curriculum aimed at aligning employee performance with organizational goals; selects delivery methods to achieve designated learning outcomes; using the ADDIE training model, responsible for all of the major phases of the instructional systems design process including needs analysis, course/program design and development, selection of instructional media and methods, and formative and summative evaluations; employs participant-centered training techniques; develops instructional materials including participant and leader guides. Based on annual learning needs assessments, recommends training and/or performance solutions to meet identified skill or knowledge gaps; uses a blended learning approach to design training solutions;</p>	

ESSENTIAL FUNCTIONS *(continued)*

20%

ensures staff receive as-needed learning opportunities on all business, technical, procedural, legislative, soft skills, and system changes; partners with HR Training Services, business area trainers, and appropriate subject matter experts to ensure training solutions and materials meet the business needs, provide agents with the most up-to-date information to serve members, and enhance staffs' business knowledge and customer service delivery skills. Possesses, acquires, and maintains the technical/professional expertise required to design training solutions to meet business needs. Uses complex CalSTRS business knowledge expertise, writing, and analytical skills to develop and design the Member Assistant Guide (MAG) system; independently reviews, analyzes, revises and maintains the MAG system with the most up to date business information.

10%

Member Service. Actively supports member service objectives by responding to member inquiries received through CalSTRS' toll-free telephone number and secured messaging system, performing all the same essential functions as a Contact Center Analyst. Research, reviews and responds to inquiries and resolves member-related issues from CalSTRS' members and their beneficiaries; assists Contact Center agents with answering member inquiries by providing technical information and guidance through the elevated queue and responding directly to the more difficult member questions or complaints. Adheres to organizational expectations and serves as a role model for Contact Center staff; acts as a subject matter expert for less experienced Trainers.

15%

Team Participation. Leads or participates on cross-functional and division process improvement teams. Professionally represents Customer Service and effectively communicates Customer Service's perspective; participates on Customer Service project teams to analyze information and data and recommend process improvements and solutions; develops more effective and efficient methods to successfully accomplish tasks; works cooperatively with others to produce innovative solutions; anticipates possible problems; develops and communicates recommendations for resolution; and provides regular project updates to leadership and appropriate staff.

Training Evaluation: Using data from Kirkpatrick's four levels of training evaluation, continually analyzes and evaluates training effectiveness in achieving business outcomes. Based on analyses, independently makes recommendations for improving content, content delivery, and other performance improvement tactics; initiates post-training review process to gather data and trainee performance from Team Supervisors, Team Managers, and Quality Assurance Analysts; analyzes data to determine if trainees have achieved expected performance targets and recommends curriculum adjustments to address systemic problems.

MARGINAL FUNCTIONS

None.

COMPETENCIES

All staff are expected to understand and consistently demonstrate the CalSTRS core values, core competencies, and classification-specific competencies:

Core Values	Core Competencies	Associate Analyst Classification Competencies
Customer Service	Adaptability & Flexibility	Analytical Thinking
Accountability	Communication	Creative Thinking
Leadership	Customer/Client Focus	Ethics and Integrity
Strength	Teamwork	Forward Thinking
Trust	Work Standards & Quality Orientation	Managing Work
Respect		Organizational Awareness
Stewardship		Planning and Organizing
		Technical/Professional Knowledge and Skills
		Thoroughness
		Written Communication

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED OF THE JOB

WORK ENVIRONMENT

- High rise building
- Office setting with an open floor plan and low partitions

PHYSICAL ABILITIES

- Sit for extended periods on a daily basis
- Use a computer keyboard and read from computer screens for several hours each day
- Talk on the telephone for extended periods using a headset
- Ability to present in front of a training classroom setting
- May be required to work a shift starting as early as 6:30 a.m. or ending as late as 6:30 p.m.

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

Vacant

PERSONNEL ANALYST'S NAME (Print)

PERSONNEL ANALYST'S SIGNATURE

DATE