

## DUTY STATEMENT

		EFFECTIVE DATE
BRANCH	Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 1139 - 001
DIVISION/UNIT	Client Outreach and Guidance/Administration	CLASS TITLE Office Technician (Typing)
INCUMBENT	Vacant	WORKING TITLE COG Administration Support
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>The Client Outreach and Guidance (COG) division is the principal area of the organization that develops, delivers and coordinates educational services to CalSTRS members, employers and staff. The purpose of COG is to empower members to make educated decisions about their CalSTRS benefits and retirement.</p> <p>Under general direction of the Pension Program Manager I (PPM I), the Office Technician (Typing) performs of a variety of administrative duties necessary for the operation of the statewide counseling program administered by the COG Division.</p>		
% of time performing duties	Duties and Responsibilities	
	<b>ESSENTIAL FUNCTIONS</b>	
25%	Independently uses various internet-based survey and data collection programs, download, filter, cross-tab and prepare contact information to disseminate and administer surveys. Maintains survey data to ensure timely reporting for quarterly Level of Service and Customer Service reports to support organizational goals. Prepare data-based charts and information as requested by the COG Director, Assistant Director, Field Services and other managers.	
20%	Support administrative services analysts by monitoring and tracking Benefits Counseling Program activity while working closely with Field Services Managers to provide information and ad-hoc reports to support administrative oversight of CalSTRS and contractor-operated counseling offices. Travel to COG field offices and member service center to provide direct assistance to managers and staff regarding administrative services functions.	
20%	Tracks payment history of contracts and works closely with contractor representatives to resolve discrepancies. Maintains Invoice Tracking Log on SharePoint. Assist administration services analysts with communication between Accounting and COG and keep Excel contract payment logs current on a daily basis.	
15%	Works with COG division team and leadership in booking travel using BusinessDirect, Concur and troubleshooting travel discrepancies.	
15%	Responsible for securing bids, collecting information, and obtaining price quotes for requested items. Includes scheduling interpreting services for necessary counseling sessions.	
	<b>MARGINAL FUNCTIONS</b>	
5%	Participates as a team member with other CalSTRS staff as well as on special projects that have a substantial departmental impact.	

**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 governmental program analyst's daily performance:

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

**INTERPERSONAL SKILLS**

- Communicate effectively.

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

WORK ENVIRONMENT

- Prolonged periods of sitting.
- Office setting with low partitions. Very open floor plan.
- Work in a high rise building, in an open space environment

PHYSICAL ABILITIES

- Ability to use a computer keyboard and mouse several hours a day.
- Move up to 25 pounds.
- Read from computer screens several hours a day.
- Talk on the telephone for extended periods using a headset.

**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

POSITION NUMBER (Agency – Unit – Class – Serial)

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PERSONNEL ANALYST'S NAME (Print)

PERSONNEL ANALYST'S SIGNATURE

DATE

7/1/11