

SANTA BARBARA COUNTY EDUCATION OFFICE  
Personnel Commission

**CALSTRS RETIREMENT BENEFITS COUNSELOR**

**Basic Function**

Under the supervision of the Assistant Superintendent, Human Resources, responsible for performing a wide variety of tasks associated with providing CalSTRS retirement counseling to members throughout but not limited to Santa Barbara and San Luis Obispo counties while maintaining a high degree of discretion, diplomacy, confidentiality and initiative and taking independent action to resolve any relevant issues as they arise.

**Essential Duties and Responsibilities**

- Assist and conduct individual and group retirement benefits counseling interviews with CalSTRS members according to Client Outreach and Guidance policies and procedures.
- Receive questions, problems and requests, either by telephone, in writing or in person from CalSTRS members; answer user questions, resolve problems, respond to requests or refer to other individuals as appropriate.
- 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 dates, option beneficiaries, and unused sick leave balances.
- Determine, design, and provide appropriate workshops based on school district employee demographics and feedback from school district staff.
- Investigate new avenues to deliver CalSTRS information to school district certificated staff such as during new employee orientation, in-service days, and through district-wide communication tools.
- Partner with school campuses to effectively promote CalSTRS on-site visits utilizing tools such as flyers, handouts, posters, email notifications.
- Administer participant surveys and feedback tools. Evaluate CalSTRS program success on campuses. Recommend CalSTRS on campus improvements to Client Outreach and Guidance management based on surveys and feedback.
- Promote CalSTRS member education opportunities to active teachers through school site visits and attending education related conferences.

- Conduct retirement planning workshops at locations throughout the community. Promote CalSTRS member education opportunities at various outreach events. Prepare electronic presentations and present to both large and small groups.
- Maintain positive and ongoing relationships with school sites and staff.
- Perform other essential job-related duties and responsibilities as assigned.

### **Qualifications**

- **Knowledge and Skills**

Working knowledge of the California State Teachers' Retirement System procedures, policies, and benefits including the policies and procedures associated with the Client Outreach Guidelines. Working knowledge of State pension reform, legal guidelines, and case law. Basic understanding of the difference between certificated and classified service in the public school system. Actuarial mathematics in the analysis of individual pension plans. Interpersonal relations skills with emphasis on customer service including tact, patience, and courtesy. Strong decision-making skills determined by gathering diagnostic information. Excellent computer skills to include industry standard software applications and familiarity with databases. Modern administrative office practices, procedures, and equipment. Excellent telephone techniques and etiquette. Excellent report writing techniques. Excellent English usage, grammar, spelling, punctuation and vocabulary.

- **Abilities**

Communicate clearly and articulate to others at varied levels of understanding, given varied backgrounds and communication styles. Demonstrate strong customer service skills including patience, the ability to listen well, and to determine individual needs. Establish and maintain effective cooperative working relationships with various school employees, administrators, and community members. Compose correspondence and written materials independently, edit and proofread documents. Work independently with little direction. Maintain strict confidentiality, ethics, and integrity in all aspects of work. Establish and maintain a priority scheduling system to maximize outreach. Maintain records, prepare reports and make small and large group visual and verbal presentations. Analyze situations accurately and adopt an effective course of action. Attend to details.

- **Physical Abilities**

Incumbent must be able to work in an office setting engaged in work of a primarily sedentary nature. Requires ambulatory ability to retrieve files and stand at a counter for customer service transactions. Requires sufficient hand-eye-arm coordination to use a keyboard and mouse and arm/hand movements to retrieve work materials from storage files, and operate a variety of general office equipment. Requires visual acuity to read computer screens, printed material, and detailed accounting information. Requires auditory ability to carry on conversations over the phone and in person.

### **Education and Experience**

Bachelor's Degree and four years experience in a responsible administrative or program support position, preferably in Human Resources. Evidence of four years of experience working with pension systems.

**Licenses and Certificates**

As incumbent may travel to different sites and locations within the county, the Office requires possession of a valid California Class C driver's license and insurance coverage as required by law. Verification of the California State Teachers' Retirement System counselor training program must be completed within the probationary period.

**Working Conditions**

Office environment where minimal safety considerations exist. Some travel to community or school locations for outreach.

Approved: November 21, 2013