



**BENEFITS COUNSELOR
CALIFORNIA STATE TEACHERS RETIREMENT SYSTEM
(CALSTRS)**

Job Summary

The CalSTRS Benefits Counselor is responsible to the County Superintendent and works under the direct supervision of the Personnel Director. The CalSTRS Benefits Counselor provides benefits counseling services to members for retirement, survivor, and disability programs.

Examples of Duties

The CalSTRS Benefits Counselor will conduct individual, confidential interviews with CalSTRS members, beneficiaries, and benefit recipients, and provide accurate, clear and concise written and oral explanations of information; compute and explain benefits and pertinent CalSTRS policies, procedures, and related service credit records, as those matters relate to an individual member's need and salary; conduct workshops providing information about membership, benefits and services available from CalSTRS; compile and submit reports in a timely manner; attend initial and periodic training and informational meetings conducted by CalSTRS personnel and/or follow-up Benefits Counselor training; schedule, coordinate, and provide workshops and interviews; operate as a CalSTRS pension benefit resource for county and district superintendents upon their request; contact county and district superintendents or their representatives to schedule certificated employee interviews and workshops; gather pertinent member information prior to member interviews using microfiche, print and data screen information.

Education and Experience

Graduation from high school or equivalent demonstration of basic competency. Four or more years experience involving payroll, personnel or benefits administration or related field. Demonstrated success in group presentation skills. Previous experience with CalSTRS programs or other public retirement programs highly desirable. Successful completion of CalSTRS training program and skills assessment in order to verify:

Knowledge of:

- CalSTRS manual, forms and publications;
- laws and regulations pertaining to specific duties;
- office practices, methods and procedures;
- techniques of good public relations and public speaking;
- micro computers, word processing and data file management.

Ability to:

- understand, interpret and apply CalSTRS laws, policies, procedures and member information;
- organize work and communicate clearly and concisely both orally and in writing;
- maintain records, compile and verify data;
- provide services confidentially;
- travel to required regional and out-of-area meetings and/or conferences as assigned;
- operate modern office equipment, including computers;
- adapt to changing work demands including adjustments to work schedule;

- make formal presentations to small and large audiences;
- work independently and exercise sound judgment;
- manage task priorities to meet deadlines;
- work under varying degrees of stress.

Other Position Requirements:

Must possess a valid California driver's license issued by the State Department of Motor Vehicles or otherwise provide assurance of being able to serve multiple sites in a given day and travel out-of-county for training on a periodic basis.

Individuals who serve as a CalSTRS Benefit Counselor must provide services in the office, as well as in various sites throughout the county, sometimes serving multiple sites in a single workday. Public speaking skills, group problem solving, leadership ability, the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak work flow, and perform efficiently within restricted time frames are critical factors for success in this position.

Individuals who serve as in this position must be willing to modify days/hours and to work additional days/hours on occasion with appropriate compensation and be willing to travel using own transportation with mileage reimbursed, or county office fleet vehicle, as the job may require.

NOTE: The position will start at .5 FTE and may increase with additional duties and responsibilities. Initially, the majority of work hours will be in the afternoon M-F, but an occasional evening and Saturday will be required during the year to serve customer needs.

Range 55

Personnel Commission Approved May 8, 2007