



## ASSOCIATE PENSION PROGRAM ANALYST

### Examination Announcement

*Departmental Promotional Exam for the Following County Location(s):  
(Los Angeles/Orange/Riverside/San Diego/Santa Clara & Yolo Counties)*

Final Filing Date: Continuous Filing

Salary: \$4,600.00 - \$5,758.00

#### EEO

An equal opportunity employer to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, or sexual orientation.

#### DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

#### WHO SHOULD APPLY?

Applicants who meet the minimum qualifications as stated may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

Once you have taken the examination, you may not reapply for (12) months.

This is a promotional examination for California State Teachers' Retirement System (CalSTRS). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service with California State Teachers' Retirement System, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a service-connected disability; or honorably discharged from active duty as defined in Government Code Section 18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference points will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information, Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former CalSTRS employees may be allowed to compete under the provisions of Rule 235.

#### SPECIAL TESTING INFORMATION

If you are an individual with a disability and need reasonable accommodation to participate in this examination, please mark the box in question #2 on the "examination application". You will be notified in writing to determine what assistance can be provided.

## FILING INSTRUCTIONS

Applications and Qualifications Assessments must be submitted via the U.S. Postal Service or hand delivered to the CalSTRS Human Resources Office (hours are 8:00 AM to 5:00 PM). Applications/Qualifications Assessments will not be accepted via e-mail and/or fax. Standard State Application (STD. 678) can be found at CalHR's website [www.jobs.ca.gov](http://www.jobs.ca.gov)

**Responses to the Qualifications Assessment attached to this bulletin must be submitted along with your standard state application (STD.678) when applying for this examination.**

Mailing Address:	Physical Address:
CalSTRS Human Resources Attention: Classification and Selection Services Unit (Exams) P.O. Box 15275 Sacramento, CA 95851-0275	CalSTRS Human Resources Attention: Classification and Selection Services Unit (Exams) 100 Waterfront Place – Lobby West Sacramento, CA 95605-2807

The testing office will accept Examination Applications (STD. Form 678) and Qualifications Assessments continuously and will notify and test applicants on an as needed basis.

**Submit applications/qualifications assessments only to the address indicated above. Do not submit to the California Department of Human Resources (CalHR).**

NOTE: Only applications with original signature will be accepted. Facsimiles (FAX) or emailed applications will not be accepted under any circumstances.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

Applicants must meet the experience/education requirements by the cut-off date. Your signature on your application indicates that you have read and understood and do possess the qualifications required. Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as "Either I", or "Or II", etc. For example, candidates who possess qualifying experience amounting to 50% of the required time of Pattern I, and additional experience amounting to 50% of the required time of Pattern II, may be admitted to an examination as meeting 100% of the overall experience requirement.

**Applicants must provide a copy of their degree at the time of filing.** If this information is not included (unless education is not needed), the application will be declined and a notice will be mailed to the applicant asking for this information by a determined deadline date.

Acceptable course work and degrees must be completed at a regionally accredited institution. Course work completed in other states is acceptable as long as the institution holds regional accreditation through an accrediting body. Course work and degrees completed outside of the United States must be evaluated by an approved foreign transcript evaluation agency before they may be used for credentialing purposes.

## MINIMUM QUALIFICATIONS

### EITHER I

One year of experience in the California state service performing the duties of a class at a level of responsibility equivalent to a Pension Program Analyst, Range C.

### Or II

**Experience:** Three years of increasingly responsible professional experience which consisted of the interpretation and application of laws and regulations of the pension fund industry. And

**Education:** Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis). Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination but must fully meet the experience requirement before being eligible for appointment.

**Experience** applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements. Additionally, State experience applied toward the non-State experience pattern must be in a class at a level of responsibility at least equivalent to that of one of the classes specified in the promotional State experience pattern.

## POSITION DESCRIPTION

This is the full journey level. Under general direction, the incumbent independently performs the more responsible and complex tasks, including program development, conceptualization of legislative proposals, systems analysis, the review and revision of complex procedures, sensitive public contacts or negotiations with members, beneficiaries, employers or employee groups, and other related work. As a team leader or member, completes special projects that have substantial program or departmental impact. This level has greater independence and greater scope of responsibility and technical expertise than lower-level staff. Projects impact the assigned division, multiple divisions, and/or STRS.

## ELIGIBLE LIST INFORMATION

Names of successful competitors are merged onto the list in order of final scores, regardless of date. Eligibility expires after **12 months** unless the needs of the services and conditions of the list warrant a change in this period. The resulting eligible list will be used to fill vacancies in Glendale/Irvine/Riverside/San Diego/Santa Clara/West Sacramento.

## EXAMINATION INFORMATION

### Qualifications Assessment -- Weighted 100%

This examination will consist of a Qualifications Assessment weighted 100%. Candidates must attain an overall minimum score of 70% in order to be placed on the eligible list.

**NOTE:** It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

**CANDIDATES WHO DO NOT COMPLETE OR SUBMIT THE QUALIFICATIONS ASSESSMENT WILL BE DISQUALIFIED.**

## SPECIAL PERSONAL CHARACTERISTICS/ ADDITIONAL DESIRABLE QUALIFICATIONS

Open-mindedness, flexibility, and tact; commitment to improving services.

Demonstrated capacity for development as evidenced by work history, academic attainment, and well-defined occupational or vocational interest; ability to accept increasing responsibility; ability to serve as a mentor in a team environment.

## KNOWLEDGE, SKILLS, ABILITIES, & PERSONAL CHARACTERISTICS

### Knowledge of:

1. Applicable laws, rules, regulation, and policies
2. The legislative process
3. Research methods
4. Completed staff work
5. Principles and concepts of Continuous Quality Improvement
6. The team building process
7. Principles of project management
8. Systems analysis
9. Strategic, tactical, and organizational planning

### Ability to:

1. Apply conceptual reasoning.
2. Anticipate problems or difficulties
3. Analyze and solve complex problems
4. Anticipate consequences of change
5. Interpret and apply provisions of the STRS' laws, rules, and policies
6. Secure and evaluate facts by interview or correspondence
7. Make sound decisions
8. Gather, analyze data, and draw logical conclusions

**(Cont.) Ability to:**

9. Effectively manage caseload work
10. Prepare clear, complete, and concise reports
11. Build and maintain effective working relationships with internal and external customers
12. Communicate in English at a level required for successful job performance
13. Work effectively in a team environment
14. Manage the team process (team builder, facilitator, leader, or member)
15. Work with others to achieve desired goals
16. Effectively express facts and ideas in individual or group settings
17. Anticipate and meet customer needs
18. Carry out assignments without detailed instructions
19. Identify and resolve systemic problems
20. Determine the need for and apply creative thinking to problem solving
21. Conduct analytical studies
22. Monitor and evaluate various projects
23. Effectively write complex reports/projects
24. Effectively represent the Department in formal settings

### VETERANS PREFERENCE

Veterans' Preference credits will not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference credit.

### BACKGROUND INFORMATION

Prior to employment with CalSTRS, a background investigation (BI) will be conducted. The BI consists of a personal history statement, an online BI application, and fingerprinting. The BI will check criminal and civil records and, if applicable, verify education and check driving records.

### CONTACT INFORMATION

For additional information regarding this examination, please contact the California State Teachers' Retirement System (CalSTRS) at (916) 414-4990.

### DISCLAIMER

Please click on the link below to review the official California Department of Human Resources (CalHR) class specification: [Associate Pension Program Analyst](#)

### GENERAL INFORMATION

**For an examination with a written feature**, it is the candidate's responsibility to contact CalSTRS four weeks after the date the application was submitted if he/she has not received a progress notice.

**For an examination without a written feature**, it is the candidate's responsibility to contact CalSTRS three weeks after the final filing date if he/she has not received his/her notice.

**If a candidate's notice** of oral interview or performance test fails to reach him/her 3 days prior to their scheduled appointment due to a verified postal error, he/she will be rescheduled upon written request.

**Examination Locations:** When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

**Examination Applications are available** at [www.jobs.ca.gov](http://www.jobs.ca.gov), CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

**If you meet the requirements** stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

**Candidates needing special testing arrangements** due to a disability must mark the appropriate box on the application and/or contact the testing department.

## GENERAL INFORMATION (Cont.)

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**If Promotional Examinations Only:** Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at departmental personnel offices, at the State Personnel Board office or [www.jobs.ca.gov](http://www.jobs.ca.gov).

**If High School Equivalence is Required:** Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.

**College Education:** The qualifications meeting the requirement "Equivalent to graduation from college" means satisfaction of the requirements for the bachelor's degree from an accredited, recognized institution of higher education. This means the applicant must show receipt of a bachelor's degree. Acceptable college course work must be from an accredited, recognized institution approved by the California Superintendent.

**Career Credits:** In open, non-promotional examinations, career credits are granted to: 1) State employees with permanent civil service status, 2) full-time employees of the state who are exempt from State civil service pursuant to the provisions of Section 4 of Article VII of the California Constitution, and who meet all qualification requirement specified by the Board and have 12 consecutive months of service in an exempt position, and 3) individuals who have served one full year in, or are graduates of, the California Conservation Corps (eligibility shall expire 24 months after graduation from the California Conservation Corps). Three points are added to the final test score of those candidates who meet the above criteria, and who are successful in the examination. Such examinations cannot be for managerial positions described in Government Code Section 3513. Competitors not currently employed in state civil service who have mandatory reinstatement rights may also be eligible for career credits, but they must explain their service status in the appropriate section of the application Form 100-678. (Section 4 of Article VII of the California Constitution is posted at the State Personnel Board, 801 Capitol Mall and Sacramento).

**TTD** is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TTD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800-735-2929 or from voice phone: 1-800-735-2922.

**California State Teachers' Retirement System (CalSTRS), P.O. Box 15275, Sacramento, CA 95851-0275  
Phone: (916) 414-4990**



**CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM  
HUMAN RESOURCES  
QUALIFICATIONS ASSESSMENT FOR:  
ASSOCIATE PENSION PROGRAM ANALYST**

**GENERAL INSTRUCTIONS**

**Read instructions carefully**

This examination will provide you with an opportunity to demonstrate significant aspects of your qualifications for Associate Pension Program Analyst with the California State Teachers' Retirement System (CalSTRS). The information you provide will be rated based on objective criteria created by Subject Matter Experts. The rating will be used to determine your final score in this examination. If successful, your name will be placed onto an eligible list. The list will be used by CalSTRS to fill existing positions. A "Conditions of Employment" form is included in this examination which will allow you to select the location and time base you are interested in working. It is required that you personally complete this examination accurately and without assistance.

This process is the entire examination for this classification. Therefore, please be sure to follow the instructions carefully as missing or incomplete information may result in disqualification or a low score.

1. Additional instructions are provided on the following pages.
2. This examination enables you to apply for the Associate Pension Program Analyst classification. If successful, your name will be placed on an eligible list.
3. The examination is intended to provide candidates the opportunity to demonstrate their knowledge and experience in a variety of areas. It is not expected that you will have experience in all areas.

The following areas comprise the complete examination for Associate Pension Program Analyst. You must ensure you have addressed each of the following areas:

- Candidate Information (page 2)
- Prior State Employment Information (page 2)
- Conditions of Employment (page 2)
- Address or Availability for Employment Changes (page 3)
- Minimum Qualifications (page 3)
- Work Experience (page 4 - 6)
- Knowledge, Skill, and Ability Assessment (pages 7 - 8)
- Preparation for Hiring Interview (page 10)
- Qualifications Assessment Return and Mailing Procedures (page 10)
- Affirmation Statement (page 10)

**YOUR COMPLETED STANDARD STATE APPLICATION (STD.FORM 678) AND COMPLETED QUALIFICATIONS ASSESSMENT MUST INCLUDE YOUR ORIGINAL SIGNATURE. BOTH DOCUMENTS WILL BE ACCEPTED ON A CONTINUOUS TESTING BASIS.**

# CALSTRS

## CANDIDATE INFORMATION

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Home Telephone Number: \_\_\_\_\_

Work Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

## PRIOR STATE EMPLOYMENT INFORMATION

Complete this next section **ONLY** if you have been previously dismissed from California State Civil Service employment by punitive action or as a result of disciplinary proceedings. **IF THIS DOES NOT APPLY TO YOU**, please mark the "Not Applicable" box below and continue to the next section.

State Personnel Board, Rule 211 provides that a dismissed State employee may only participate in State Civil Service examinations if he/she has obtained prior consent from the State Personnel Board.

Do you have written permission from the State Personnel Board Executive Officer to take this examination?

<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> NOT APPLICABLE
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## CONDITIONS OF EMPLOYMENT FOR CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM

PLEASE MARK THE APPROPRIATE BOX(ES) OF YOUR CHOICE - YOU WILL NOT BE OFFERED A JOB IN LOCATIONS NOT MARKED.

Note: Positions are not available at all locations. Please refer to the official examination bulletin for information regarding current available positions and their locations.

If you are successful in this examination, your name will be placed on an active employment list and referred to fill vacancies according to the conditions you specify on this form.

### TYPE OF APPOINTMENT YOU WILL ACCEPT

Please mark the appropriate box(es) - you may check "(A) Any" if you are willing to accept any type of employment.

(D) Permanent Full-Time    (R) Permanent Part-Time    (K) Limited-Term Full-Time    (A) Any

If all are marked and you receive an appointment other than permanent full-time, your name will continue to be considered for permanent full-time positions.

### LOCATION(S) YOU ARE WILLING TO WORK:

1900 LOS ANGELES COUNTY    3000 ORANGE COUNTY    3300 RIVERSIDE COUNTY  
 3700 SAN DIEGO COUNTY    4300 SANTA CLARA COUNTY    5704 YOLO COUNTY



**ADDRESS OR AVAILABILITY FOR EMPLOYMENT CHANGES**

Please notify the California State Teachers' Retirement System promptly of any address changes or availability for employment changes at the following address:

California State Teachers' Retirement System  
Human Resources  
100 Waterfront Place  
West Sacramento, CA 95605  
Attention: Vicki Jukich

**MINIMUM QUALIFICATIONS**

**EITHER I**

**Experience:** One year of experience in the California state service performing the duties of a class at a level of responsibility equivalent to a Pension Program Analyst, Range C.

**OR II**

**Experience:** Three years of increasingly responsible professional experience which consisted of the interpretation and application of laws and regulations of the pension fund industry.

**And**

**Education:** Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but must fully meet the experience requirement before being eligible for appointment.

**Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements. Additionally, State experience applied toward the non-State experience pattern must be in a class at a level of responsibility at least equivalent to that of one of the classes specified in the promotional State experience pattern.**

# CALSTRS

## WORK EXPERIENCE

Under "Work Experience," for items #1 - #13, please indicate	Frequency					Length of Experience		
	Performed task within last 5 years	Weekly	Monthly/Quarterly	Semi-Annual/Annual	Never	60+ months	24 to 59 months	0 to 23 months
<p><b>Frequency:</b></p> <p>A. If you have performed this task within the last 5 years</p> <p>B. How often you perform this task (Please select <u>one</u> box from "Weekly", "Monthly/Quarterly", "Semi-Annual/Annual", or "Never" column)</p> <p style="text-align: center;"><b>AND</b></p> <p><b>Length of Experience:</b></p> <p>A. Select the appropriate box that best describes your months (length) of work experience for each of the following tasks. Only count actual months worked. If counting substitute teaching experience, please convert working days to full-time month's equivalent. (Please select <u>one</u> box from the "Length of Experience" column)</p> <p><b>NOTE: There may be up to <u>three</u> (3) checkmarks for each question.</b></p>								
1. Provide and demonstrate excellent customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Communicate in English by telephone, in person, or in written form with various internal and external customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Independently manage assigned workload	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Represent business area on cross-functional project teams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Serve as lead to coordinate and/or facilitate process improvements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Assist staff and employers in understanding and applying the Education Code, CalSTRS policies and/or procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Serve as subject matter expert to support development of training, communication and procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Develop business partnerships with internal and external customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Plan, organize, and lead staff activities to support program objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Coach and mentor team members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Prepare sensitive correspondence describing and correctly applying laws and directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Resolve escalated internal and external customer issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Research and prepare issue papers that identify alternatives and recommend potential solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS (For HR Use Only)</b>								

# CALSTRS

## WORK EXPERIENCE (CONTINUED)

<p>Under "Work Experience," for items #14 - #26, please indicate</p> <p><b>Frequency:</b></p> <p>A. If you have performed this task within the last 5 years</p> <p>B. How often you perform this task (Please select <u>one</u> box from "Weekly", "Monthly/Quarterly", "Semi-Annual/Annual", or "Never" column)</p> <p style="text-align: center;"><b>AND</b></p> <p><b>Length of Experience:</b></p> <p>B. Select the appropriate box that best describes your months (length) of work experience for each of the following tasks. Only count actual months worked. If counting substitute teaching experience, please convert working days to full-time month's equivalent. (Please select <u>one</u> box from the "Length of Experience" column)</p> <p><b>NOTE: There may be up to <u>three</u> (3) checkmarks for each question.</b></p>	Frequency					Length of Experience		
	Performed task within last 5 years	Weekly	Monthly/Quarterly	Semi-Annual/Annual	Never	60+ months	24 to 59 months	0 to 23 months
14. Provide technical expertise and training to staff, employers, and/or field counseling staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Develop and document procedures and workflow for existing and new processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Analyze, evaluate and recommend approval/disapproval of contractual and/or benefit decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Research and determine the resolution of complex account data within the scope of the Education Code, and CalSTRS systems, policies and/or procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Research and analyze policies and business practices to verify legal compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Prepare and deliver presentations representing a professional organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Research and analyze complex system issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Develop reports, memoranda, and/or administrative directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Prepare executive reviews and controlled correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Assist in the development of detailed program specifications and business rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Analyze the impact of legislation as it affects CalSTRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Compile, analyze, and produce statistical reports on program activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Develop implementation plans for newly approved legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS (For HR Use Only)</b>								

# CALSTRS

## WORK EXPERIENCE (CONTINUED)

Under "Work Experience," for items #27 - #29, please indicate	Frequency					Length of Experience		
	Performed task within last 5 years	Weekly	Monthly/Quarterly	Semi-Annual/Annual	Never	60+ months	24 to 59 months	0 to 23 months
<p><b>Frequency:</b></p> <p>B. If you have performed this task within the last 5 years</p> <p>B. How often you perform this task (Please select <u>one</u> box from "Weekly", "Monthly/Quarterly", "Semi-Annual/Annual", or "Never" column)</p> <p style="text-align: center;"><b>AND</b></p> <p><b>Length of Experience:</b></p> <p>C. Select the appropriate box that best describes your months (length) of work experience for each of the following tasks. Only count actual months worked. If counting substitute teaching experience, please convert working days to full-time month's equivalent. (Please select <u>one</u> box from the "Length of Experience" column)</p> <p><b>NOTE: There may be up to <u>three</u> (3) checkmarks for each question.</b></p>								
27. Create and participate in review of member articles and publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Collect and analyze data and prepare reports on performance measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Participate as a business area expert in the design, development, testing, and implementation of information system changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS (For HR Use Only)</b>								

# CALSTRS

## KNOWLEDGE/SKILL/ABILITY (KSA) ASSESSMENT

For items #1 – #15, please rate your Knowledge, Skill, or Ability (KSA) by indicating the box that best describes your level of the KSA for each of the following areas.

**Definition of Levels:**

**Extensive Knowledge, Skill, or Ability:** I have applied this KSA in an actual setting while performing a job.

**Moderate Knowledge, Skill, or Ability:** I have this KSA to perform this task, but may require general supervision.

**Limited Knowledge, Skill, or Ability:** I have education or training relevant to this KSA, but have not applied it to an actual job.

**No Knowledge, Skill, or Ability:** I have no experience, education or training relevant to this KSA.

	KSA Level			
	Extensive Knowledge, Skill, or Ability	Moderate Knowledge, Skill, or Ability	Limited Knowledge, Skill, or Ability	No Knowledge, Skill, or Ability
1. Skill to effectively communicate verbally in English at a level required for successful job performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Knowledge of the structure and content of the English language including the meaning and spelling of words and the rules of composition and grammar, in order to ensure that written materials prepared and reviewed are complete, concise and free of mechanical errors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Ability to make sound decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Ability to prioritize workload to meet deadlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Ability to build and maintain effective working relationships with internal and external customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Ability to conduct oneself in a professional manner under a variety of circumstances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Ability to interpret and apply provisions of CalSTRS' laws, rules, and policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Ability to work with others to achieve desired goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Ability to learn knowledge and skills related to specific tasks, methodologies, materials, tools, and equipment to understand its implications and apply lessons to current and future problem solving and decision-making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Ability to communicate with tact, sensitivity and political awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Ability to behave effectively during stressful working conditions (e.g. tight deadlines, workload, public speaking) in order to complete tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Ability to analyze and solve complex problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Ability to effectively convey complex information in writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Ability to anticipate problems or difficulties and propose solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Ability to effectively and persuasively express facts and ideas in individual or group settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS (For HR Use Only)</b>				

# CALSTRS

## KNOWLEDGE/SKILL/ABILITY (KSA) ASSESSMENT (CONTINUED)

For items #16 – #29, please rate your Knowledge, Skill, or Ability (KSA) by indicating the box that best describes your level of the KSA for each of the following areas.	KSA Level			
	<u>Extensive</u> Knowledge, Skill, or Ability	<u>Moderate</u> Knowledge, Skill, or Ability	<u>Limited</u> Knowledge, Skill, or Ability	<u>No</u> Knowledge, Skill, or Ability
<p><b>Definition of Levels:</b></p> <p><b><u>Extensive</u> Knowledge, Skill, or Ability:</b> I have applied this KSA in an actual setting while performing a job.</p> <p><b><u>Moderate</u> Knowledge, Skill, or Ability:</b> I have this KSA to perform this task, but may require general supervision.</p> <p><b><u>Limited</u> Knowledge, Skill, or Ability:</b> I have education or training relevant to this KSA, but have not applied it to an actual job.</p> <p><b><u>No</u> Knowledge, Skill, or Ability:</b> I have no experience, education or training relevant to this KSA.</p>				
16. Skill to use Microsoft Office products at a level required for successful job performance (Excel, Access, Word, PowerPoint, Visio, Outlook, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Ability to independently and effectively manage caseload work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Ability to gather and analyze data to draw logical conclusions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Knowledge of completed staff work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Ability to apply conceptual reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Ability to anticipate customer needs and exceed expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Ability to carry out assignments without detailed instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Ability to effectively model teamwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Ability to anticipate consequences of change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Ability to determine the need for and apply creative thinking to problem solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Ability to obtain and evaluate facts by interview or correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Ability to prepare clear, complete, and concise reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Ability to monitor and evaluate various projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Knowledge of research methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS (For HR Use Only)</b>				



**PREPARATION FOR HIRING INTERVIEW**

If you are successful in this examination and called for a hiring interview, you will be asked to supply transcripts of your college course work, proof of degree(s) received and any credential(s) that may be applicable. Additionally, you may be asked to supply supplemental documentation to verify your responses in this examination. It is strongly recommended that you assemble transcripts and licenses in advance to expedite the process.

**QUALIFICATIONS ASSESSMENT RETURN AND MAILING PROCEDURES**

**Do not attach any additional documents** to this Qualifications Assessment or send any forms/documents in advance as additional documents will not be rated. This Qualifications Assessment will account for 100% of the weight of your examination for this classification. **You may mail or deliver in person the completed Qualifications Assessment to the following address:**

California State Teachers' Retirement System  
Human Resources  
100 Waterfront Place  
West Sacramento, CA 95605  
Attention: Associate Pension Program Analyst

**NOTE:**

- Candidates whose Qualifications Assessment is postmarked, personally delivered, or received via interoffice mail after the Cutoff date will be eliminated from the current examination and will be in the next testing period.
- Be sure your envelope has **adequate postage** if submitting via mail.
- Facsimiles (FAX) will **NOT** be accepted under any circumstances.
- Make and keep a photocopy of the completed Qualifications Assessment for your records.
- The STD. Form 678 may be downloaded from the California Department of Human Resources (CalHR) website at <http://jobs.ca.gov/Profile/StateApplication>.

**AFFIRMATION STATEMENT**

**THIS AFFIRMATION MUST BE COMPLETED**

**Government Code Section 18935 (a):**

“The department or a designated appointing power may refuse to examine, or after examination may refuse to declare as eligible, or may withhold or withdraw from an eligible list, before the appointment, anyone who meets any of the following criteria:

(4) Has misrepresented himself or herself in the application or examination process, including permitting another person to complete or attempt to complete a portion of the examination on his or her behalf

I hereby certify and understand that the information provided by me on this questionnaire is true and complete to the best of my knowledge and contains no willful misrepresentation or falsifications. I also understand that if it is discovered that I have made any false representations, I will be removed from the list resulting from this examination and may not be allowed to compete in future examinations for State employment. If already hired from the result of this examination, I may have adverse action taken against me, which could result in dismissal.

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

NAME (PRINTED): \_\_\_\_\_

**THIS COMPLETES THE QUALIFICATIONS ASSESSMENT**