



Duty Statement

Classification: **Staff Services Analyst**

Position Number: **275-330-5157-xxx**

HCM#: **XXXX**

Branch/Section: **All CalPERS Branches**

Location: **Sacramento, CA**

Telework: Office-centered

Working Title: **CalPERS Business Analyst – multiple positions**

Effective Date: **TBD, 2023**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: **Yes** **No**

CalPERS is the nations' largest pension fund. We serve more than 1.9 million members in the retirement system and 1.5 million members and their families in our health program from state, school, and public agencies. We are governed by a 13-member Board of Administration, consisting of elected, appointed, and ex officio members and our executive team.

As a defined benefit retirement plan, we provide benefits based on a member's years of service, age, and highest compensation and provide disability and death benefits. CalPERS offers additional programs, including long-term care insurance, deferred compensation plans (for participating public agencies and schools), and member education services.

Under supervision, the incumbent serves in a developing analytical, consultative, and specialized evaluative role in various CalPERS topics to ensure the delivery and sustainability of pension and health benefits to our members and their beneficiaries. The incumbent exercises a high degree of initiative and judgment when researching and analyzing problems and issues, identifying alternatives, and recommending and/or implementing solutions. The incumbent in this position must respect and maintain the confidentiality of information acquired during their duties including mitigating risk and ensuring our business partner, stakeholder and member needs are met. Incumbents will work at the developing analyst-level in one of the following offices or program areas: Actuarial Office, Communications & Stakeholder Relations, Customer Services & Support, Enterprise Compliance Office, Financial Office, General Counsel Office, Health Policy & Benefits Branch, Investment Office, or Operations & Technology.

Essential Functions

40% **Core Analytical Work:** Participate in the completion of a variety of core analytical work to accomplish the day-to-day operations of your assigned area.

Core analytical work includes entry-level analytical work related to one or more CalPERS programs or specialties such as: research and analysis, account management, provide recommendations and program alternatives, data collection, analysis and reporting, training and development, administrative system support, internal process improvement and innovation, member, board, and stakeholder education, program development and implementation, budgets and contracts, operational and business support, conducting surveys, planning and facilitating hybrid meetings, focus groups and other engagements with stakeholders.

20% **Projects and Cross Functional Work:** Participate on special projects and on division or enterprise teams in support of annual business and strategic plans and special requests from business partners.

Work with program subject matter experts (SME) on special projects and as part of division or enterprise teams in support of annual business and strategic plans and special requests from business partners and stakeholders. Projects and cross functional work may include entry-level analytical work related to divisional and enterprise projects such as: conducting and documenting intake, creating project plans, identifying resources, developing communications, planning and facilitating meetings, setting realistic timelines, assigning action items, providing data analysis, identifying process gaps and solutions, conducting research and analysis related to CalPERS functions and policies, developing recommendations, creating job aids, forms, procedures and other work products in support of project team goals.

- 15% **Documentation and Analysis:** Assist to develop and maintain reports, historical files, current information, spreadsheets, program metrics, procedures, and supporting documentation for a variety of division and/or organizational programs. Documentation and analysis may include entry-level analytical reporting work such as: conducting research on a broad range of business related topics and industry best practices, compiling data from various sources, analyzing and conducting data validation, creating and providing weekly, monthly, quarterly and/or routine annual reports and/or metrics to program leaders and other stakeholders, coordinating with internal and external business partners to update and maintain detailed procedures and stringent reporting standards.
- 10% **Presentations and Training:** Assist subject matter experts and trainers on select CalPERS program topics. Presentations and training may include all facets of entry-level tasks such as: identifying knowledge gaps, developing, designing, and delivering a variety of presentations, trainings, and/or other communications and related process, policies, and/or procedures, for large and small audiences. Training topics may include, but are not limited to, routine and/or specialized and focused trainings which may be requested or required.
- 10% **Policy and Legislation:** Identify the need for policies, procedures, and legislative proposals to be written. Policy and legislation may include conducting in-depth proposal analysis, coordinating and/or participating in their development, collaborating with various stakeholders throughout the organization to implement any other relevant actions, and preparing any relevant materials online and in print.
- 5% Represent CalPERS with various levels of CalPERS stakeholders at meetings or in projects. Other duties and special projects as assigned. Attends training and refresher courses as necessary to broaden knowledge, skills, and abilities.

Knowledge, Skills, and Abilities

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work.

Working Conditions

- Office environment with standard office equipment
- Prolonged periods of sitting
- Read and view computer screens for several hours a day

- Occasional overtime may be required
- Occasional offsite travel may be required.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance
- Ability to demonstrate punctuality, initiative, and dependability
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance)
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature: _____ **Date:**

I certify that the above accurately represent the duties of the position.

Supervisor Signature: _____ **Date:**



Duty Statement

Classification: **Associate Governmental Program Analyst**

Position Number: **275-XXX-5393-7XX**

HCM#: **XXXX**

Branch/Section: **All CalPERS Branches**

Location: **Sacramento, CA**

Telework: Office-centered

Working Title: **CalPERS Business Analyst – Multiple Positions**

Effective Date: **June, XX, 2023**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: Yes No

CalPERS is the nations' largest pension fund. We serve more than 1.9 million members in the retirement system and 1.5 million members and their families in our health program from state, school, and public agencies. We are governed by a 13-member Board of Administration, consisting of elected, appointed, and ex officio members and our executive team.

As a defined benefit retirement plan, we provide benefits based on a member's years of service, age, and highest compensation and provide disability and death benefits. CalPERS offers additional programs, including long-term care insurance, deferred compensation plans (for participating public agencies and schools), and member education services.

Under direction, the incumbent serves as an expert in various CalPERS topics to ensure the delivery and sustainability of pension and health benefits to our members and their beneficiaries. The incumbent exercises a high degree of initiative and judgment when researching and analyzing problems and issues, identifying alternatives, and recommending and/or implementing solutions. The incumbent in this position must respect and maintain the confidentiality of information acquired during their duties, including mitigating risk and ensuring our business partners, stakeholders and members needs are met. Incumbents will work at the full journey-level in one of the following offices or program areas: Actuarial Office, Financial Communications & Stakeholder Relations, Customer Services & Support, Enterprise Compliance Office, Financial Office, General Counsel Office, Health Policy & Benefits Branch, Investment Office, or Operations & Technology.

Essential Functions

- 40% **Core Analytical Work:** Includes full journey-level analytical work related to one or more CalPERS programs or specialties such as: research and analysis, account management, provide recommendations and program alternatives, data collection, analysis and reporting, training and development, administrative system support, internal process improvement and innovation, member, board, and stakeholder education, program development and implementation, budgets and contracts, operational and business support, conducting surveys, and planning and facilitating hybrid meetings, focus groups and other engagements with stakeholders.
- 20% **Projects and Cross Functional Work:** Act as a program subject matter expert (SME) on special projects independently and as part of division or enterprise teams in support of annual business and strategic plans and special requests from business partners and stakeholders. Projects and cross functional work may include full journey-level analytical work related to divisional and enterprise projects such as: conducting and documenting intake, creating project plans, identifying resources, developing communications, planning and facilitating meetings, setting realistic timelines, assigning action items, providing data analysis, identifying process gaps and solutions, conducting research and analysis related to CalPERS functions and policies,

developing recommendations, creating job aids, forms, procedures and other work products in support of project team goals.

- 15% **Documentation and Analysis:** Independently develops and maintains reports, historical files, current information, spreadsheets, program metrics, and supporting documentation for CalPERS programs. Documentation and analysis may include all journey level analytical reporting work, such as: conducting research on pension, health and related topics and industry best practices, compiling data from various sources, analyzing and conducting data validation, creating and providing weekly, monthly, quarterly and/or routine annual reports to leaders and other stakeholders, coordinating with business partners and internal team members to update and maintain detailed procedures and stringent reporting standards related to CalPERS programs.
- 10% **Presentations and Training:** Act as the subject matter expert and trainer on select CalPERS program topics. Presentations and training may include all facets of full journey-level tasks such as: identifying knowledge gaps, developing, designing, and delivering a variety of presentations, trainings, and/or other communications and related process, policies, and/or procedures, for large and small audiences. Training topics may include, but are not limited to, routine and/or specialized and focused trainings which may be requested or required.
- 10% **Policy and Legislation:** Identify the need for policies, procedures, and legislative proposals to be written. Policy and legislation may include conducting in-depth proposal analysis, coordinating and/or participating in their development, collaborating with various stakeholders throughout the organization to implement any other relevant actions, and preparing any relevant materials online and in print.
- 5% Represent CalPERS with various levels of CalPERS stakeholders at meetings or in projects. Other duties and special projects as assigned. Attends training and refresher courses as necessary to broaden knowledge, skills, and abilities.

Knowledge, Skills, and Abilities

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees.

Working Conditions

- Office environment with standard office equipment, campus setting
- Prolonged periods of sitting and/or standing
- Read and view computer screens for several hours a day
- Occasional overtime may be required
- Occasional offsite travel may be required.

Conduct, Attendance and Performance Expectations

- Must maintain consistent attendance
- Act independently, with open-mindedness, flexibility, and tact.
- Demonstrate punctuality, initiative, and dependability
- Model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance)

- Demonstrate proficiency in CalPERS Competencies: Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature: _____ **Date:**

I certify that the above accurately represent the duties of the position.

Supervisor Signature: _____ **Date:**