



# Duty Statement

Classification: **Staff Services Analyst**

Position Number: **275-190-5157-709**

HCM#: **5709 JC-437235**

Branch/Section: **Customer Experience Division/Workforce Strategy and Optimization  
Section/Quality Assurance Team 2**

Location: **Sacramento, CA**

Working Title: **Quality Assurance Analyst**

Effective Date: **June 10, 2024**

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

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

Telework:  **Office-Centered**  **Remote-Centered**  **Not Eligible**

The CalPERS Customer Experience Division (CXD) is the first point of contact for CalPERS customers, providing customer services and education via multiple channels, including phone and electronic correspondence, concerning retirement and health benefits. This requires applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, legislation, and policy initiatives.

Under supervision of a Staff Services Manager I (SSM I), the Staff Services Analyst (SSA) is responsible for administering the duties of the Five Star Customer Experience Program. Responsibilities include assessing interactions completed by phone agents to ensure that customer service standards are met and identifying trends and training opportunities.

Duties include, but are not limited to:

## Essential Functions

Remote-centered team members will be required to come into Sacramento Headquarters or their assigned Regional Office location on a routine, regular basis for instances including, but not limited to, attending CalPERS business-related meetings, picking-up and/or dropping-off of office equipment or work materials/product, attending training, and obtaining general office supplies or when your specific position requires work to be performed onsite.

- 40% Onsite<sup>1</sup> and virtually, perform analytical review of the execution of CalPERS statutes, laws, rules, regulations, policies, and procedures by monitoring and evaluating Contact Center phone agents providing professional assistance and information to customers. Provide timely feedback to Contact Center team leaders, based on analytical review of agent trends, in the form of evaluating interactions based on the success criteria outlined in the Five Star Customer Experience Program review form as it relates to authentication, soft skills, technique, accuracy, and resolution. Ensure quality customer service practices are met, policies and procedures are accurately executed, and positive customer service traits are

identified. Demonstrate the ability to type at a speed and proficiency to meet performance expectations.

35% Onsite and virtually, participate on special projects and develop Quality Assurance (QA) Team program material to ensure consistency within the QA Team and to communicate the purpose of the Five Star Customer Experience Program to CXD. Participate in team meetings. Make recommendations for changes to the program, used to evaluate calls. Develop Five Star Customer Experience Program processes for monitoring and evaluating Contact Center staff. In conjunction with the QA, manager attend meetings with other areas within CalPERS or other State agencies to share Five Star Program information.

25% Onsite and virtually, assist the CXD leadership team in the development of division wide policies and procedures. Provide on the spot assistance to team leaders to correct misinformation. Make sound recommendations to consistently improve the Five Star Customer Experience Program and QA processes. Perform other duties as assigned that are appropriate for the classification.

### Working Conditions

- <sup>1</sup> This position is designated as remote-centered and works primarily at their designated alternate work location.
- Office Coverage is required from 8:00 AM to 5:00 PM.
- Travel may be required for offsite training, events, and/or meetings.

### 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: **275-190-5393-709**

HCM#: **5709 JC-437235**

Branch/Section: **Customer Experience Division/Workforce Strategy and Optimization  
Section/Quality Assurance Team 2**

Location: **Sacramento, CA**

Working Title: **Senior Quality Assurance Analyst**

Effective Date: **June 10, 2024**

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

Supervision Exercised:  Yes  No

Telework:  Office-Centered  Remote-Centered  Not Eligible

The CalPERS Customer Experience Division (CXD) is the first point of contact for CalPERS customers, providing customer services and education via multiple channels, including phone and electronic correspondence, concerning retirement and health benefits. This requires applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, legislation, and policy initiatives.

Under the direction of a Staff Services Manager I (SSM I), the Associate Governmental Program Analyst (AGPA) is responsible for administering the more complex duties of the Five Star Customer Experience Program. Responsibilities include assessing interactions completed by phone agents to ensure that customer service standards are met, assisting with mentoring phone agents, identifying trends and training opportunities, and reviewing customer satisfaction survey comments.

Duties include, but are not limited to:

## Essential Functions

Remote-centered team members will be required to come into Sacramento Headquarters or their assigned Regional Office location on a routine, regular basis for instances including, but not limited to, attending CalPERS business-related meetings, picking-up and/or dropping-off of office equipment or work materials/product, attending training, and obtaining general office supplies or when your specific position requires work to be performed onsite.

- 40% Onsite<sup>1</sup> and virtually, independently, perform analytical review of the execution of CalPERS statutes, laws, rules, regulations, policies, and procedures by monitoring and evaluating Contact Center phone agents providing professional assistance and information to customers. Provide timely feedback to Contact Center team leaders, based on analytical review of agent trends, in the form of evaluating interactions based on the success criteria outlined in the Five Star Customer Experience Program review form as is relates to authentication, soft skills, technique, accuracy, and resolution. Act as a subject matter expert to ensure quality customer

service practices are met, policies and procedures are accurately executed, and positive customer service traits are identified. Demonstrate the ability to type at a speed and proficiency to meet performance expectations.

35% Onsite and virtually, lead special projects and develop Quality Assurance (QA) Team program material to ensure consistency within the QA Team and to communicate the purpose of the Five Star Customer Experience Program to CXD. Develop class criteria and deliver the Five Star Customer Experience Program training module for CXD new employee training. Facilitate team meetings. Take a lead role in updating any changes to the program, used to evaluate calls. Develop Five Star Customer Experience Program processes for monitoring and evaluating Contact Center staff. Assist in developing Five Star and Customer Survey Feedback Programs for areas within CXD. Assist with mentoring and development of phone agents. Research and review customer satisfaction comments. In conjunction with the QAT manager attend meetings with other areas within CalPERS or other State agencies to share Five Star Program information.

25% Onsite and virtually, assist the CXD leadership team in the development of division wide policies and procedures. Provide on the spot assistance to team leaders to correct misinformation. Make sound recommendations to consistently improve the Five Star Customer Experience Program and QA processes. Perform other duties as assigned that are appropriate for the classification.

### **Working Conditions**

- <sup>1</sup> This position is designated as remote-centered and works primarily at their designated alternate work location.
- Office Coverage is required from 8:00 AM to 5:00 PM.
- Travel may be required for offsite training, events, and/or meetings.

### **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:**