



Duty Statement

Classification: **Research Data Specialist I**

Position Number: **275-185-5742-021**

HCM#: **3131**

Branch/Section: **Policy Research & Data Analytics / Enterprise Policy Research**

Location: **Sacramento, CA**

Working Title: **Policy Researcher**

Effective Date: **October 9, 2024**

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

Supervision Exercised: Yes No

Telework: Office-Centered Remote-Centered Not Eligible

CalPERS is the nation's largest public pension fund. Within CalPERS, the Policy Research & Data Analytics (PRDA) Division provides research, guidance, and data analytics to inform retirement-related issues and business decisions. PRDA employs research data techniques to assess the impact of potential retirement policy changes and sustainability of benefits and services, and continuously improve business processes.

Under the general direction of the Research Data Supervisor II, Enterprise Policy Research Unit, the Research Data Specialist (RDS) I is responsible for independently designing and leading multiple research projects and assignments. The RDS I have advanced knowledge of and experience using a variety of research, analytical, and statistical methods and techniques used in data analysis and to provide comprehensive research. The RDS I manage workload consisting of multiple projects and assignments, completes work under critical timelines to meet project requirements, and writes clear and concise studies and reports. The RDS I exercise a high degree of independence, initiative, flexibility, and tact in performing the duties listed below and may perform other team assignments as required and appropriate for this level.

Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

40% Complex Research Projects, Advanced Data Analytics, and Subject Matter Expertise
Onsite¹ and virtually, leads multiple project developments, implementations, facilitation, analyses, and completion of deliverables. Develops, oversees, manages, and deploys

enterprise-wide projects with policy, data, and process improvement components to ensure efficient prioritization and timely completion of projects. Functions as a technical lead for complex projects to ensure timely completion. Analyze situations accurately and escalate issues timely. Identifies and recommends program strategies, policy changes, and implementation approaches based on research findings. Plans and facilitates in-person working sessions and develop approaches to achieve session objectives. Prepares research and statistical reports that clearly articulates research scope, analysis, and results, utilizing proper grammar and spelling, and follows department guidelines. Presents in-person research findings and recommendations orally and in writing to team members, leadership, and executives, as applicable.

Data Analytics

Onsite and virtually, independently performs a variety of qualitative and quantitative research tasks to collect, prepare, validate, organize, and conduct quality control of structured and unstructured data. Conducts advanced data analysis to interpret advanced statistics, perform hypotheses testing, interpret results and make recommendations to key stakeholders. Develops procedures for collection and integration of data sources.

Onsite and virtually, develops and presents user-friendly aids. Utilizes software to tabulate data and prepare spreadsheet summaries, reports, charts, and tables. Conducts moderately complex modeling and programming techniques and applies computerized models to research data, statistical and other methods used in the analysis. Performs basic arithmetic and statistical techniques to analyze numerical data. Performs advanced mathematical techniques, descriptive statistical analysis methods and techniques, and advanced survey analysis methods and techniques. Analyzes data using advanced statistical software (e.g., SAS) and Microsoft Office applications (e.g., Word, Excel, PowerPoint, and Power BI) to prepare, analyze, validate data, and help answer pension policy and process improvement research questions.

Subject Matter Expertise

Onsite and virtually, serves as a policy expert to independently lead and provide guidance to peers. Reviews, prepares, and organizes data and uses advanced statistical software to conduct analyses of policy issues, identify insights, and interpret and document findings. Provides knowledge sharing on executing effective data, policy, and/or process improvement projects. Recommends program strategies, policy changes, and implementation approaches based on research findings and statistically significant data insights.

30%

Onsite and virtually, interprets, synthesize, and develop operational, state, local, and federal law policy changes. Provides an expert level of retirement industry and research expertise to independently interpret state and federal law and to estimate potential impacts on CalPERS programs. Recommends policy, legislative, or regulatory changes based on research findings to leadership and Executives. Develops new policies and legislative or regulatory language to comply with applicable state and federal laws and regulations. Collects external and internal data from a variety of sources, including governmental survey results, certified databases, and proprietary data sources to support state and federal-level policy research. Ensures retirement, operational, and Board policy research findings and leadership direction align with CalPERS mission, goals, and objectives.

- 20% Onsite and virtually, utilizes project management and team collaboration techniques, such as charters, communication plans, flow charts, and tracking resources to assist leadership in ensuring projects stay on track and identify key impacted stakeholders. Identifies creative collaborative techniques to increase team engagement. Uses storytelling techniques to synthesize information to multiple stakeholders. Applies and provides guidance to team members on effective project planning and facilitation techniques. Uses statistics, process improvement frameworks, survey methodologies, and focus group techniques to design research projects. Collects external and internal data from a variety of sources, including governmental survey results, certified databases, and proprietary data sources to support state and federal-level policy research.
- 10% Onsite and virtually, stays current with public policy, research methods, and pension news and trends, including developments in retirement programs, retirement funding structures and practices, pension plan designs and concepts, federal tax issues related to public pension plans, and research methodologies. Analyzes and interprets laws and policies. Evaluates internal polices and processes to determine alignment with applicable laws. Builds and maintains an advanced working knowledge of current and proposed changes to the Public Employees' Retirement Law (PERL) and federal laws and regulations.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Workstation is on the 5th floor accessible by stairs and elevator, in a standard office building with artificial light and adjustable office chairs.
- Prolonged reading, typing and data analysis on a laptop, keyboard, and computer screen.
- Various time-critical assignments are part of the typical workload.

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: