



Duty Statement

Classification: **Associate Government Program Analyst** **JC-418485**
Position Number: **275-711-5393-021** HCM#: **8581**
Branch/Section: **Employer Account Management Division / Member Elections Team**
Location: **Sacramento, CA** Telework: **Office-centered**
Working Title: **Member Elections Analyst** Effective Date: **February 1, 2024**
Collective Bargaining Identifier (CBID): **R01** Supervision Exercised: **Yes** **No**

The Employer Account Management Division (EAMD) oversees and manages the day-to-day retirement operations of membership, payroll, compensation review, and serves as the state Social Security Administrator for public agencies throughout the state. We are committed to providing superior service and support to our business partners to ensure timely, accurate, and compliant reporting.

Under the direction of the Staff Services Manager I, Member Elections Team (MET), the incumbent performs the more responsible, varied, and complex work in a wide variety of consultative and analytical staff services assignments, including, but not limited to:

Essential Functions

45% Onsite¹ and virtually, respond to the more complex and sensitive requests and inquiries via written and verbal correspondence to members, other public retirement systems, business partners, and financial institutions. Respond and fulfill more complex requests such as executive inquiries, Public Records Act requests, and escalated inquiries requiring more analysis to provide specific membership election information and determinations based on the Public Employees Retirement Law (PERL). Independently review, analyze, and process determinations for eligibility, including CalPERS/CalSTRS elections, reciprocity determinations, State Second tier elections, optional membership determinations, and PEPRAs determinations, within myCalPERS by utilizing procedures and obtaining information through verbal & written correspondence with business partners and members. Notify members and business partners of determination and election rights via written and verbal correspondence and update determination in myCalPERS with clear and concise notes. Utilize multiple CalPERS systems and resources such as myCalPERS, legacy database systems, PERL, myInfo, CSS Connects, and SharePoint to research and obtain necessary membership information to complete eligibility determinations or respond to inquiries. Monitor accounts for completion and follow up with employers, members, and reciprocal systems; update all tracking systems to complete transactions. Contact customers both internally and externally to assist in resolving questions and review accounts to determine further action. Actively participate in Unit, Division, Branch, and CalPERS team meetings, forums, and activities.

30% Onsite and virtually, review, complete, and respond to assignments, problems, or projects that require additional review. Act as a lead for special projects that require collaboration with team members and other program areas within CalPERS. Prepare and develop written recommendations and correspondence including Legal opinion requests, Circular Letters, and other communication to educate customers and/or resolve questions related to MET issues.

Onsite and virtually, support the management in the studying and documenting of operational practices and procedures throughout MET. Develop and propose alternatives and recommendations for management approval

on MET issues. As assigned, write procedures for policy changes, systems changes, new legislation, and/or improved methods, including those which are not prescribed by laws and policies for management review. Write new procedures and assist in the training of team members. Act as lead to support team members and management with questions, requests for assistance, and projects, as needed. Review and develop changes and updates for various manuals, policies, and publications (i.e.: Public Agency and State Agency Manuals, Booklets, etc.) for the areas related to the Employer Account Management Division.

- 20% Onsite and virtually, review, analyze, identify, and resolve more complex conflicts with applicable statues and policy memorandums, and prepare written recommendations to management on the appropriate course of action to be taken. Prepare and deliver presentations via myCalPERS and legacy systems to business partner groups and be available to answer questions. Research and provide written articles for the Employee Newsletter and other publications to management and other divisions. Support management in the analysis, coordination, and implementation of legislation and court decisions for impact on division operations. Aid management in the identification of potential conflicts and make recommendations to management for appropriate amendments. Assist in the coordination of the implementation with other divisions, when required. Attend administrating hearings and represent CalPERS in court as a witness through the legal process. Work with management in the research and preparation of written responses to sensitive inquiries received by and for the signature of the Governor, Legislators, CalPERS Board Members, Executive Staff, and division management. Compile and summarize statistical data in reports on workload or other data for division management. Identify and report system defects and recommend enhancements to myCalPERS. Lead efforts for myCalPERS enhancements and issues including participating in discussions with other program areas to develop enhancements, leading system testing, and ensuring functionality is working as intended prior to implementation.
- 5% Onsite and virtually, participate in enterprise-wide projects, committees, and represent the division at system-wide meetings. Participate in the Retirement Planning Fairs, Employer Forum, Webinars and other offsite conferences, meetings, and events as appropriate, which may require infrequent travel within the State of California. Perform other related duties as assigned by management.

Working Conditions

- ¹This position is designated as office-centered and works primarily onsite at the Sacramento, CA Headquarters at least three weekdays.
- Some travel may be required.
- On a rotational basis, all employees will be required to provide telephone coverage and employer assistance during the normal office hours of 8:00 a.m. to 5:00 p.m.

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:

Employee Signature: _____

Date:

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

Supervisor Signature: _____

Date: