



# Duty Statement

Classification: **Research Data Analyst II**

Position Number: **275-103-5731-003**

HCM#: **3765**

Branch/Section: **Customer Services & Support Branch / Member Account Management Division / Branch Administrative Services Section / Administrative Services / Data Solutions & Reporting**

Location: **Sacramento, CA**

Working Title: **Data Analytics Research Analyst**

Effective Date: **May 11, 2026**

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

Supervision Exercised:  Yes  No

Telework:  Office-Centered  Remote-Centered  Not Eligible

The Member Account Management Division (MAMD) administers the Service Credit Purchase & Elections (SCPE) Program. Services include assisting with requests and elections for purchasing service credit, providing refunds of member contributions, and conducting in-depth research and analysis of member accounts to address potential service credit accrual discrepancies. The division also provides a wide range of administrative support to six divisions in the Customer Services & Support (CSS) Branch. In this capacity, the Branch Administrative Services Section (BASS) coordinates human resources support for approximately 900 team members, oversight of the \$121 million branch budget, and data collecting and reporting of CalPERS CSS Customer Service metrics.

Under the general supervision of the Supervisor I of the Data Solutions & Reporting Unit, the Research Data Analyst (RDA) II is responsible for conducting advanced research, data collection, report design, and developing methodologies for CSS data projects. The RDA II retrieves, organizes, and analyzes complex data to develop resources for tracking performance metrics across the branch.

## 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.

45%      Reviews and analyzes complex performance metric data to identify and track CSS branch workload trends. Applies advanced spreadsheet and database skills to effectively produce charts, tables, graphs, and reports that are used for analytical, research, and decision-making

purposes. Analyzes data using spreadsheets and statistical tools (e.g., Microsoft Excel and Access; SAS; Python; etc.) to facilitate business process improvement analyses.

Reviews metric reports, conducts thorough independent analysis, and interprets results to form opinions and make recommendations. Scrutinizes data for anomalies, inconsistencies, and errors. Creates performance metrics status reports to present to branch leadership. Coordinates with division leadership to ensure clear understanding of the metrics data. Consults with BASS leadership to ensure metric reports function as effective performance tracking tools. Identifies needs for improving existing data reporting tools. Recommends, designs, and creates new statistical reports as needed.

Develops protocols and procedures to collect, analyze, and publish statistical data. Designs and employs safeguards to protect the accuracy and integrity of data produced for branch leadership and the Board of Administration. Creates and uses backup systems to protect program files. Utilizes storage methods to retrieve data and reports for historical research purposes. Trains team members as back up for production of reports, statistics, and systems.

- 25% Works with program area subject matter resources and leadership as needed to address the efficiency and effectiveness of CSS operations. Engages in systematic, critical, and intensive research toward finding solutions to program-related issues. Conducts studies on problem identification, program evaluation, workload inventory, and preparation of proposed implementation plans, including the development or revision of policies, procedures, forms, and/or systems.
- 15% Acts as a key participant in enterprise-wide and Branch-wide projects such as the Cost Effectiveness Measurement Benchmarking (CEM) Survey. Researches, analyzes, and facilitates the annual CEM report. Attends planning meetings for CEM to ensure coordination and completion of the annual survey with other CalPERS divisions. Researches and reviews CEM data in a timely manner and prepare responses. Performs other related duties and ad-hoc projects and assignments as needed.
- 10% Modifies, documents, and implements new procedures and assist with the coordination of policy changes, systems changes, new legislation, and/or improved methods. Monitors the implementation of new procedures, policies, and systems to assure they are working as planned and, if necessary, initiates adjustments.
- 5% Provides backup support for the CSS customer satisfaction survey program and Full Voice of the Customer program as needed by assisting with methodology research, helping to develop and administer customer satisfaction surveys using Survey Monkey, and supporting the compilation, evaluation, analysis, and interpretation of survey data and producing reports.

### **Working Conditions**

- <sup>1</sup> This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.

### **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:**