



Duty Statement

Classification: **Analyst II**

Position Number: **275-103-5393-704**

HCM#: **4772**

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 Solutions and Reporting Analyst**

Effective Date: **January 1, 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 direction of the Supervisor I of the Data Solutions & Reporting Unit, the Analyst II performs the more responsible, varied, and complex technical analytical assignments related to administering customer satisfaction surveys, monitoring compliance activities, coordinating branch-wide projects, and facilitating administrative processes on behalf of the CSS 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.

25% Onsite¹ and virtually, supports the CSS customer satisfaction survey program and Full Voice of the Customer governance by conducting methodology research, developing and administering customer satisfaction surveys through Survey Monkey; compiling, evaluating,

analyzing, and interpreting survey data; and preparing recommendations and reports through Microsoft Excel, Word, and Teams.

- 25% Onsite and virtually, applies compliance knowledge and industry standards, as well as project management techniques, to plan and coordinate compliance initiatives within CSS. Uses compliance tools to assess, monitor, and report on CSS compliance control activities (e.g., operational risk events, Ethics Helpline complaints), in partnership with the Enterprise Compliance, Risk, and Governance Office (ECRG) and CSS senior leaders. Compiles and tracks compliance plan implementation activities in Excel. Produces compliance-related management reports using CalPERS tools, such as Word, Excel, SharePoint, and EthicsPoint, a software program used to manage Ethics Helpline Complaints.
- 25% Onsite and virtually, analyzes, monitors, and supports completion of branch-wide data collection activities such as the Biennial Language Survey, Risk Assessment, Compliance report, User Access Review, Diversity Equity and Inclusion report, National Association of State Retirement Administrators report, Facts at a Glance, Business Plan Initiatives, and other assigned activities. Collaborates with assigned CSS branch teams and leadership to gather and compile information for branch-wide activities. Analyzes, reviews, and assesses materials for accuracy and alignment with reporting requirements. Drafts reports using Microsoft Word and Excel and, as directed, presents outcomes to CSS leadership. Serves as the liaison between the Office of Stakeholder Relations and the CSS branch by coordinating the tracking, reporting, and resolution of Public Records Act (PRA) requests for all CSS divisions through SharePoint, Teams, and Excel, including redacting records and coordinates with division contacts within CSS to obtain all relevant records for PRA requests. Serves as the liaison between the Legislative Affairs Division and the CSS Branch by tracking, reviewing, and analyzing legislation for all CSS divisions in Outlook and Excel. Coordinates with division contacts within CSS to develop, monitor, and analyze internal legislative proposals, and to develop implementation charts for legislative activities and their program impacts in Excel. Reviews and processes content maintenance on Inside CalPERS.
- 20% Onsite and virtually, uses project management skills and tools such as Word, Excel, SharePoint, PowerPoint, and Visio to assist or lead project teams (e.g., planning, initiating, implementing, and monitoring). Creates and maintains project plans, timelines, and related documentation in Excel, Word, Visio, PowerPoint, and Adobe Acrobat Pro to track progress and ensure completion of all identified milestones and tactics. Supports in facilitating CSS branch objectives by coordinating meetings and implementing branch-wide activities. Prepares and delivers reports and communications, both orally and in writing, on findings and provides support related to division or system-wide annual, business, strategic plans and projects to MAMD leadership. Participates in the completion of enterprise-wide reports such as Cost Effectiveness Measurement (CEM) benchmarking, as directed. Prepares official correspondence, memos, board agenda items, and reports, including those for division chief and executive signature, as assigned through Excel, Word, PowerPoint, and Visio. Manages communications, both orally and in writing, that involves confidential and sensitive information in accordance with CalPERS policies and procedures.
- 5% Onsite and virtually, performs other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ 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:**