



Duty Statement

Classification: **Research Data Specialist II**

Position Number: **275-185-5758-002**

HCM#: **2611**

Branch/Section: **Operations & Technology / Strategy, Projects & Data Analytics / Lean Insight Team**

Location: **Sacramento, CA**

Working Title: **Senior Quality Improvement Researcher**

Effective Date: **August 1, 2025**

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 Strategy, Projects & Data Analytics Division (SPDA) supports CalPERS in achieving enterprise goals by guiding enterprise planning and performance; leading organizational development, change management, and strategic projects; and conducting research and data analytics to inform policy issues, business decisions, and process improvements.

Under the general direction of the Research Data Supervisor II, Lean Insight Team (LIT), the Research Data Specialist (RDS) II is responsible for independently designing and leading multiple complex research projects and assignments. The RDS II has extensive 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 II manages workload consisting of multiple complex projects and assignments, completes work under critical timelines to meet project requirements, uses creativity when independently designing research projects, and writes clear and concise studies and reports. The RDS II exercises 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%	Onsite ¹ and virtually, coordinates the development and implementation of complex research projects, facilitates project work sessions, conducts assigned analyses, and completes
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deliverables identified in approved project charters and work plans. Develops and coordinates enterprise-wide projects with policy, data, and process improvement components by applying approved prioritization criteria, project plans, and research methods; recommends implementation approaches to the supervisor and project sponsors. Functions as technical lead for complex projects by coordinating research activities, consolidating project analyses, identifying unresolved issues, and providing status updates and risk assessments to the supervisor and project sponsors. Analyzes project data, methodological issues, implementation risks, and stakeholder feedback; documents findings and recommends corrective actions within approved project scope. Identifies and recommends program strategies, policy changes, and implementation approaches based on research findings. Independently plans and facilitates in-person working sessions and develops approaches to achieve session objectives. Prepares research and statistical reports documenting research scope, questions, methodology, data limitations, analysis, results, and recommendations in accordance with department guidelines. Presents in-person research findings and recommendations verbally and in writing to team members, leadership, and executives, as applicable.

Onsite and virtually, develops and utilizes qualitative and quantitative research methodologies and techniques to collect, prepare, validate, organize, and conduct quality control of structured and unstructured data. Conducts data analysis to interpret inferential statistics, perform hypotheses testing, interpret results, and make recommendations to key stakeholders. Develop research methodologies to address identified research questions and reduce known sources of bias.

Onsite and virtually, builds and tests analytical methods and data visualization tools to meet divisional accuracy, usability, and accessibility requirements. Utilizes software to tabulate data and prepare spreadsheet summaries, reports, charts, and tables. Build, test, and validate statistical models used to analyze research data, forecast outcomes, and evaluate policy or process improvement alternatives.

Performs advanced mathematical techniques, descriptive statistical analysis methods and techniques, and extensive 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.

Onsite and virtually, serves as a business process improvement expert to independently lead and provide guidance to peers. Reviews, prepares, and organizes data and uses advanced statistical software to conduct analyses of business process improvement issues, identify insights, and interpret and document findings. Facilitates formal Lean and process improvement trainings to enhance team member capabilities, support organizational efficiency, and standardize data-informed practices. Provides knowledge sharing and informal mentoring on executing effective data, policy, and process improvement projects. Recommends program strategies, policy changes, and implementation approaches based on research findings and statistically significant data insights.

30%

Onsite and virtually, analyzes and synthesizes operational, state, local, and federal policy changes to recommend 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 department, state and federal laws and regulations. Collects external

and internal data from a variety of sources, including government survey results, certified databases, and proprietary data sources to support state and federal-level policy research. Evaluates retirement, operational, and Board policy research findings for alignment with leadership direction, CalPERS mission, goals, and objectives, and the Public Employees' Retirement Law (PERL) to identify possible inconsistencies or implementation risks for leadership review.

- 20% Onsite and virtually, utilizes project management and team collaboration techniques, such as charters, communication plans, flow charts, and tracking resources to assist leadership document milestones, identify key impacted stakeholders, report project risks, and recommend corrective actions to leadership. Selects and recommends facilitation methods based on session objectives, participant roles, and project requirements and documents participation, decisions, and follow-up actions. Develops presentations and narrative summaries that explain research methods, findings, limitations, and operational implications to audiences with differing levels of technical knowledge. Applies and mentors team members on effective project planning and facilitation techniques. Use 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 government survey results, certified databases, and proprietary data sources to support state and federal-level policy research.
- 10% Onsite and virtually, provides guidance and status reports on public policy, 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 to identify emerging program impacts. Evaluates internal policies and processes to determine alignment with applicable laws. Performs other duties as assigned that are 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.
- 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:



Duty Statement

Classification: **Research Data Specialist II**

Position Number: **275-185-5758-004**

HCM#: **4177**

Branch/Section: **Operations & Technology / Strategy, Projects & Data Analytics / Lean Insight Team**

Location: **Sacramento, CA**

Working Title: **Senior Quality Improvement Researcher**

Effective Date: **August 1, 2025**

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

Supervision Exercised: ☐ Yes ☒ No

Telework: ☒ Office-Centered ☐ Remote-Centered ☐ Not Eligible

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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: **Research Data Specialist II**

Position Number: **275-185-5758-016**

HCM#: **7453**

Branch/Section: **Operations & Technology / Strategy, Projects & Data Analytics / Policy Insight Team**

Location: **Sacramento, CA**

Working Title: **Senior Policy Researcher**

Effective Date: **August 1, 2025**

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

Supervision Exercised: ☐ Yes ☒ No

Telework: ☒ Office-Centered ☐ Remote-Centered ☐ Not Eligible

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