Duty Statement

Classification: **Analyst II**

Position Number: **275-711-5393-055**

HCM#: **2926**

Branch/Section: **Employer Account Management Division / Member Elections Team**

Location: **Sacramento, CA**

Working Title: **Member Elections Analyst**

Effective Date: **January 1, 2026**

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

Supervision Exercised: ☐ **Yes** ☒ **No**

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

The Employer Account Management Division (EAMD) oversees and manages the day-to-day retirement operations of membership, payroll, and compensation review. 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 Supervisor I, Member Elections Team (MET), the Analyst II performs the more responsible, varied, and complex work in a wide variety of consultative and analytical assignments, including, but not limited to:

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% Onsite[1] and virtually, independently responds to requests and inquiries using written and verbal correspondence to members, other public retirement systems, business partners, and financial institutions. Responds and fulfills 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 reviews, analyzes, and processes determinations for eligibility, including Retirement System Elections, reciprocity determinations, State Second tier elections, optional membership determinations, and Public Employees' Pension Reform Act

determinations, within myCalPERS by utilizing procedures and obtaining information through verbal & written correspondence with business partners and members. Notifies members and business partners of determination and election rights using written and verbal correspondence and updates determination in myCalPERS with clear and concise notes. Uses multiple CalPERS systems and resources such as myCalPERS, legacy database systems, PERL, myExpert, Customer Services and Support Connects, and SharePoint to research and obtain membership information to complete eligibility determinations or respond to inquiries. Monitors accounts for completion and follows up with employers, members, and reciprocal systems. Updates all tracking systems to complete transactions. Contacts customers both internally and externally to assist in resolving questions and reviews accounts to determine further action. Participates in unit, division, branch, and CalPERS team meetings, forums, and activities.

30% Onsite and virtually, reviews, completes, and responds to assignments, problems, or projects that require additional review. Serves as a lead for special projects by collaborating with team members and other program areas within CalPERS. Prepares and develops written recommendations and correspondence including legal opinion requests, Circular Letters, and other communications to educate customers and resolve questions related to MET issues using myCalPERS and Microsoft Office.

Onsite and virtually, independently supports leadership team in the studying and documenting of operational practices and procedures throughout MET. Independently develops and proposes alternatives and recommendations for leadership approval on MET issues. As assigned by leadership team, drafts procedures for policy changes, systems changes, new legislation, and improved methods using myCalPERS, Microsoft applications, and other internal systems and platforms. Writes new procedures for leadership review and assists in the training of team members. Serves as lead to support team members and leadership team with answering questions, requesting for assistance, and performing projects to ensure completion of team objectives according to established time frames. Reviews and recommends updates to manuals, policies, and publications (i.e., Public Agency and State Agency Manuals, Booklets) related to the Employer Account Management Division.

15% Onsite and virtually, independently reviews, analyzes, identifies, and resolves complex conflicts with applicable statues and policy memorandums, and prepares written recommendations to leadership team on the appropriate course of action to be taken. Prepares and delivers presentations using myCalPERS and legacy systems to business partner groups and responds to questions during and after presentations. Conducts research and provides written articles for the Employee Newsletter and other publications to leadership team and other divisions. Assists leadership in the analysis, coordination, and implementation of legislation and court decisions that impact division operations. Identifies potential conflicts and recommends appropriate amendments to policies or procedures as assigned. Coordinates implementation activities with other divisions, as requested. Attends administrative hearings and represents CalPERS in court as a witness through the legal process. Collaborates with the leadership team to research and prepare written responses to inquiries received by and for the signature of the governor, legislators, CalPERS Board Members, executive team, and division leadership team. Independently compiles and summarizes statistical data in reports on workload or other data for division leadership

team. Identifies and reports system defects and recommends enhancements to myCalPERS. Coordinates efforts for myCalPERS enhancements and issue resolution by facilitating discussions with other program areas, leading system testing, and verifying system functionality prior to implementation.

5% Onsite and virtually, independently participates in enterprise-wide projects, committees, and represents the division at system-wide meetings. Participates in the Retirement Planning Fairs, Employer Forum, webinars and other offsite conferences, meetings, and events as assigned, which may require infrequent travel within the State of California.

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.
- Sitting, standing, lifting, pushing, and pulling requirements are consistent with office work.
- The incumbent works 40 hours per week in an office setting, with artificial lighting and temperature control.
- Daily access to and use of the computer, including computer programs (such as, but not limited to, the CalPERS Pension Audit System, Microsoft Office applications: Access, Excel, Outlook, PowerPoint, SharePoint, etc.) and and/or program databases (such as, but not limited to, the myCalPERS System, etc.), the telephone, office equipment (fax, printer, scanner, etc.), and PC is essential.
- Some travel may be required.

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**: