Duty Statement

Classification: **Analyst I**

Position Number: **275-921-5157-001**

HCM#: **2196**

Branch/Section: **Customer Education & Outreach Division/Regional Offices/Walnut Creek Regional Office**

Location: **Walnut Creek, CA**

Working Title: **Retirement Benefits Counselor**

Effective Date: **October 1, 2026**

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

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

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

The Customer Education and Outreach Division (CEOD) serves as the first point of contact for CalPERS employers, as well as active and retired members, offering guidance on program benefits and services. Responsibilities include educating employers and members, conducting instructor-led classes, addressing specialized education needs, managing communication functions, and creating educational materials. Additionally, CEOD oversees internal training programs for both new and existing CalPERS customer service representatives.

The CEOD Regional Offices are responsible for providing in person and virtual assistance to active and retired members by conducting presentations and meetings with customers on an individual basis regarding retirement and health benefits by applying the Public Employee Retirement Law (PERL), the Public Employee's Medical and Hospital Care Act (PEMHCA), and new legislation and policy initiatives in answering customer inquiries.

Under supervision of the Supervisor I, and working with Division Leadership, the Analyst I is responsible for assisting CalPERS customers regarding retirement and health benefits by performing the following duties of average complexity and sensitivity to support the goals and objectives of CalPERS and CEOD:

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, provide education and assistance to members, retirees, and beneficiaries regarding retirement, health benefits, and other CalPERS-administered programs in office, virtual, and field settings. Greet customers at the front counter, assess service needs, and enter customer information into applicable systems. Provide retirement counseling by applying established CalPERS laws, rules, regulations, policies, and procedures. Explain benefit topics of average complexity; accept, review, and verify incoming documents for completeness and accuracy; assist with retirement and benefit estimate requests; and utilize appropriate databases, references, policies, procedures, and tracking systems to respond to customer inquiries, including services delivered at field locations.

25% Onsite and virtually, provide assistance to the team leader, or lead analyst in scheduling and planning member education and training activities. Contribute to the development of member education materials and training content and review technical publications for accuracy and relevance. Deliver member and employer presentations, both virtually and in person (office and field settings), of average complexity regarding retirement benefit calculations, including detailed explanations of service credit, benefit factors, and final compensation. Apply CalPERS laws, rules, regulations, policies, and procedures when presenting information and responding to member and employer inquiries.

10% Onsite and virtually, respond to member inquiries verbally and in writing within established service level agreements by providing accurate information on CalPERS programs, including service and disability retirement processing, death benefits for active and retired members, post-retirement employment, retirement allowance calculations under applicable formulas, service credit, tier conversions, retirement payment options, health benefits, and State dental and vision programs.

10% Onsite and virtually, review information related to educational classes, member visits, and appointments for accuracy and completeness. Document data in accordance with established policies and procedures to maintain customer appointments, and education-related data in the CalPERS Education Center (CEC) system and other applicable systems to support program administration, tracking, and reporting requirements.

5% Onsite and virtually, in collaboration with Analyst II present and participate in meetings with employers, prospective agencies, governing bodies, and employee associations related to CalPERS retirement and health benefits. Assist with implementation of new procedures and/or changes in procedures.

5% Onsite and virtually, performs other related duties as assigned and appropriate for this classification.

Working Conditions

- [1] This position is designated as office-centered and works primarily on-site at the Walnut Creek, CA Regional Office at least three workdays.
- Office Coverage is required from 8:00 a.m. to 5:00 p.m.
- Approximately 25% to 50% of the time may be spent at field locations conducting retirement planning presentations, attending offsite training classes, special project team meetings, and providing office coverage for other regional offices.
- Multi-night travel may be required for CalPERS Benefits Education Events (CBEE) and office coverage as well as working after normal working hours and weekends.
- Exerts up to 15 lbs. of force frequently or constantly to lift, carry, push, pull, or otherwise move objects.

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 represents the duties of the position.

Supervisor Signature:_____ **Date**: