Duty Statement

Classification: **Analyst II**

Position Number: **275-440-5393-015**

HCM#: **1625**

Branch/Section: **Disability & Survivor Benefits Division / Training & Support Section**

Location: **Sacramento, CA**

Working Title: **Survivor Benefits Trainer**

Effective Date: **January 1, 2026**

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

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

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

The Disability & Survivor Benefits Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. Services include eligibility for and calculation of disability retirements, pre- and post- retirement death benefits, and adjustments. DSBD is composed of the following three sections: Disability Retirement, Survivor Benefits, and Training & Support.

The Disability Retirement section analyzes, processes, and determines eligibility for Disability Retirement (DR) and Industrial Disability Retirement (IDR) benefits, as well as processes reinstatement from DR/IDR retirement, working after retirement requests, reevaluations, and unlawful employment. The Survivor Benefits section processes applications for the payment of lump sum and monthly benefits to beneficiaries and survivors of both Active and Retired members and non-members following their death. The Training & Support section manages the Training & Development team for the division, Exceptional Processing team, and provides support to Division Chief, Assistant Division Chief, and Section Leaders.

The Survivor Benefits Training & Development team specifically is responsible for onboarding and training new and existing team members on various processes related to the functions of the section.

Under the direction of the Supervisor I, the Analyst II develops, delivers, and updates training curriculum, procedures, job aids, and training effectiveness measures for Pre- and Post-Retirement Survivor Benefits processing. This position reviews trainee work, analyzes error trends and procedural gaps, and recommends training, procedure, and system improvements to leadership.

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, plan, monitor, and lead the development of training strategies and training curriculum for all training topics related to Pre and/or Post Retirement Survivor Benefits processing. Perform written analysis of best practices by identifying any issues, determining alternatives, and making recommendations to leadership for implementing Pre- and/or Post-Retirement Survivor Benefits education. Work with the training team to develop, create, examine, and update training handouts, scripts, training prerequisites, and training effectiveness measures. Secure appropriate training venues, schedule classes via Outlook, and ensure availability of training material. Lead and conduct training on various topics related to Pre- and/or Post-Retirement Survivor Benefits processing done in a classroom setting and on an individual, on the job, training basis. Review all work done by trainees and keep detailed statistics on their error rates until released from training. Ensure training is timely and on track. Work with the team leaders and team members within the Survivor Benefits Section on training issues. Make recommendations to the leadership team for improving performance and develop training accordingly. Meet with team leaders of the Survivor Benefits Section on a frequent basis to update the progress of team members and provide input for probation reports and annual appraisals.

35% Onsite and virtually, provide guidance for team members in the mapping of processes, writing procedures, and validation of those procedures for various processes related to the functions of the section. Update procedures on a timely basis when changes occur in the processes, gaps are identified, processes are changed, or due to legislative changes. Work with the team leaders and team members within the section on procedural issues. Maintain the tracking of procedure development, ensure that updates are scheduled for existing procedures, monitor procedure development and for consistent, uniform formatting. Ensure the training matrix is updated and remains current.

20% Onsite and virtually, perform a variety of complex analytical and training assignments, such as identifying root cause of errors, making the necessary corrections and notifying the team leaders of potential training needs.

Onsite and virtually, assist with processing of Pre- and/or Post-Retirement Survivor Benefits case workload ranging from reviews to processing audit of myCalPERS system calculations to assure accuracy and completeness and releasing benefits to roll.

Onsite and virtually, assist with implementation of legislation. Identify and recommend system changes for Survivor Benefits to senior leadership. Participate in various system project groups by reviewing proposed policy, procedure, or system changes, identifying implementation impacts, and providing recommendations to section leadership. May participate and/or present at the annual Educational Employer Forum requiring travel. May

participate and/or present in the quarterly Pre-Retirement Survivor Benefits employer webinars. Perform 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.

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**: