



Memorandum

**TO: Board of Administration
Joint Personnel Committee**

FROM: John Flynn, CEO

**SUBJECT: Add one Analyst position and Delete one
Staff Specialist Position Request**

DATE: September 10, 2025

Approved

Date

RECOMMENDATION

Approve the deletion of one full-time Staff Specialist (Job Code 1622, PCN 18183) and the addition of one full-time Analyst II (Job Code 1632, PCN TBD) in the Pension Team of the Office of Retirement Services (“ORS”).

BACKGROUND

The Pension Team’s workload is overwhelmingly Analyst-level, covering complex benefit calculations, retiree counseling, and death processing for more than 15,000 members. The Staff Specialist role is limited to narrow tasks and cannot support peak workloads, creating inefficiencies and management challenges.

With high Analyst turnover and short average tenure, the need for fully capable staff has grown more urgent. When the Staff Specialist position became vacant in August 2025, ORS determined that reallocating the position to an Analyst II would better align staffing with operational needs, increase flexibility in workload distribution, and strengthen team capacity in administering retirement benefits without requiring additional positions.

ANALYSIS

Description of job duties performed by an Analyst.

The Analyst role in the Pension Team involves a variety of responsibilities related to administering retirement benefits for more than 15,000 retirees and plan members. On a day-to-day basis the Analyst assists retirement applicants and retirees in the retirement process, performs pension benefit calculations, assists family members of deceased members and employees in benefits for the estate or eligible survivors, and resolves pension and health enrollment issues.

Key duties include the following:

- Counsel new retirees, survivors, and alternate payees (ex-spouses) on pension benefits based on 10 different retirement tiers; ensure new members accurately complete enrollment forms for

eligible benefits and provide appropriate documentation; review enrollment forms for accuracy and follow with members for corrections.

- Process new retirement setups and adjustments in the Pension Administration System.
- Counsel survivors and family members after retiree deaths regarding pension benefits, coordinate applicable insurance payments to beneficiaries, and ensure related forms are completed accurately.
- Counsel former employees on retirement contribution options including reciprocity, deferred vesting, and returns of contributions (“ROCs”). Process ROCs as requested by former employees following San José Municipal Code requirements.
- Perform accurate calculations of pension benefits using Excel.
- Research and resolve a variety of pension and health related issues through San José Municipal Code, policies and procedures, current and historical payroll and employment records, and past practice records.
- Handle calculations and customer service for special assignments as assigned including legal/divorce, disability retirements, reciprocity, outside earnings & workers compensation offsets, service purchases, military leave reconciliations, 415(b), and sick leave payouts.
- Provide escalated customer service to retirees and members of the retirement plans via phone, email, and walk-in.
- Make presentations regarding pension benefits to employees and other stakeholders.
- Special projects as assigned.

The position does not supervise or lead others except in assisting with training new staff.

What has changed?

The Pension Team is supervised by 2 Senior Pension Analysts and includes 7.0 Analysts and 1.0 Staff Specialist, as well as part-time support from two Rehire Retirees (refer to attached org chart). The Staff Specialist on the Pension Team (PCN 18183) is primarily responsible for processing Return of Contributions (ROCs) as well as supporting direct deposit changes, processing “void/reissue” pension benefits when banks reject automatic deposits, and front-line customer service. In contrast, the more complex functions on the Pension Team, such as new retirement setups, death processing, and special assignment programs, are handled exclusively by Analysts.

Because the Staff Specialist classification is a lower-level role, it can perform only a limited subset of Analyst duties and cannot carry a full Analyst workload. As such, the division of duties between the 7.0 Analysts and 1.0 Staff Specialist has created challenges for workload management. Because most of the work on the Pension Team is Analyst-level, the Division Manager has frequently struggled to balance assignments equitably while ensuring alignment with job classifications. During peak retirement periods in particular, the Staff Specialist is unable to assist with high-volume Analyst work, such as new retirement setups, leaving fewer staff to manage workload and limiting the flexibility in the assignment of work. In addition, although the Staff Specialist was not assigned a full Analyst workload, the former incumbent regularly expressed concerns about performing “Analyst work,” further complicating management of the role.

These challenges are compounded by high turnover at the Analyst level with five separations in the past five years, including three within the last two. Among the six current Analysts on the Team, the average tenure is under three years, with half having fewer than two years of experience. The steep learning curve, combined with high workload demands and turnover, has placed added pressure on the Senior Analysts and Division Manager to manage, train, and support the team.

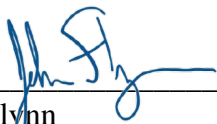
When the Staff Specialist became vacant in August 2025, ORS reassessed the needs of the Division and determined that reallocating the position to Analyst, through an add/delete action, would better meet operational requirements. This change will increase flexibility by enabling the incumbent to take on the full scope of Pension Analyst work, rather than being restricted to a narrow subset of duties. It will also strengthen the team’s capacity; help address workload concerns; and mitigate the impacts of turnover. To support this reallocation, ROC work will be shifted to the Analysts, while direct deposit and “void/reissue” activities will be shifted to the Customer Service Team, which has capacity to absorb the additional workload.

What is the cost implication and how will it be addressed?

The table below shows the costs associated with the change in position types:

Action	FTE	Job Code	Title	PCN	Total Cost (Top Range)
Delete	1.0	1622	Staff Specialist	18183	\$100,900.80
Add	1.0	1632	Analyst II	TBD	(\$123,330.48)
				TOTAL	\$22,429.68

Funding for the increased cost is available within the FY 2025–26 budget due to vacancies. This request will not impact the number of full-time positions within ORS. Ongoing costs will be included as part of the annual budget.



John Flynn
Chief Executive Officer (CEO)