



PRINCIPAL BENEFITS ANALYST

JC: 000379

PG: N07

BU: 91 (Non-Rep)

FLSA: Exempt

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general supervision, performs the most difficult and complex analytical tasks related to the areas of employee benefits and/or retirement administration; leads special projects that have a major impact on departmental efficiency, strategy, and operations; assists management team with strategic planning; conducts training sessions for other human resources staff, customers, and stakeholders; and performs other duties as assigned.

CLASS CHARACTERISTICS

This is the expert level class in the Benefits Analyst series. Incumbents are typically assigned significant responsibilities above the advanced journey level, performing the most complex work assigned to the series. Additionally, employees at this level may be responsible for assisting managers and/or full supervisors in performing some supervisory tasks. Positions in this class are flexibly staffed and are normally filled by advancement from the Senior Analyst level, or when filled from the outside, by appointment of incumbents with prior experience. This classification is distinguished from the Senior Benefits Analyst classification in that it is responsible for performing the most complex employee benefits and/or retirement administration tasks and leading special projects focused on improving processes at a division-wide level, whereas the latter is responsible for carrying out complex day-to-day duties for assigned functions.

REPORTS TO

Manager of Benefits or designee

EXAMPLES OF DUTIES – *Duties may include, but are not limited to, the following:*

1. Performs the most complex work related to employee benefits and retirement administration; and serves as a subject matter expert and resource for human resources staff regarding complex employee benefits and/or retirement administration matters and related processes at the District.
2. Meets with management to strategize or advise on health and/or retirement benefits related to employment issues.
3. Serves as a primary liaison for the District's contracted employee benefits vendors and/or the California Public Employees' Retirement System (CalPERS); works with benefits vendors and/or CalPERS to resolve issues that are raised and to ensure partnerships with organizations are effective and benefit District employees.

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4. Leads special projects and audits for the Benefits Division, including the planning, research, development and/or implementation of the projects or audits and/or specified technical components of the projects/audits.
5. Works with other departments and divisions – including Classification & Compensation, Human Resources Information Systems, Payroll, and Time Accounting and Administration – as the benefits subject matter expert/Benefits Division lead representative to review and propose enhancements to cross-functional processes; and develops new and/or enhanced benefits and/or retirement administration procedures and processes as directed by the Manager of Benefits.
6. Develops and delivers presentations and training sessions to Human Resources staff, District managers, current and prospective employees, and external stakeholders.
7. Researches and resolves complex benefits and retirement administration issues, particularly those that are highly scrutinized, politically sensitive, and/or have the potential to require process and procedure changes.
8. Creates, maintains and updates benefits and retirement related data in various computer applications and systems, including new plans, rates and vendor information.
9. Proposes and helps implement various controls to ensure compliance with relevant state and federal laws, labor contracts, District policies, and internal standards.
10. Researches and monitors trends related to employee benefits administration within the local labor market and makes recommendations for modifications to the benefits plans offered in the District.
11. Assists benefits management staff in planning work to be done in the division, and in the review and sign off on work performed by lower-level staff.
12. Analyzes benefits data, metrics, survey responses, and similar sources of information to identify insights that can be used to enhance the employee benefits and/or retirement administration process and uses such insights in policy and procedures recommendations.
13. Provides backup coverage for the supervision of benefits staff in the absence of higher-level management staff.
14. Keeps current on industry trends and best practices related to employee benefits and retirement administration.

QUALIFICATIONS

Knowledge of:

- Operations, services, and activities of employee benefits and/or retirement administration processes
- Federal and state laws and trends related to employee health, pension and other benefits programs

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- Laws, regulations and practices related to public pension administration and reform
- Information systems applications related to human resources, benefits, and retirement administration
- Methods, principles and techniques of research and analysis

Skill in:

- Performing advanced level employee benefits and/or retirement administration duties
- Compiling and analyzing data along with regulatory, benefit or retirement plan requirements, and labor contracts to make recommendations or to produce reports
- Leading projects with a variety of stakeholders, both within and outside of the department and District
- Managing multiple priorities and meeting deadlines in a fast-paced environment
- Utilizing formal and informal networks within an organization to achieve positive business outcomes
- Identifying and diagnosing client needs and proactively working to address them
- Collaborating across functional areas
- Working independently to propose ideas and meet deadlines
- Interpreting, explain and applying policies and procedures, collective bargaining agreements, laws, and regulations
- Providing lead direction to lower-level staff
- Communicating clearly and concisely, both orally and in writing
- Establishing and maintaining effective working relationships with those contacted in the course of work
- Operating office equipment, including computers and supporting word processing and spreadsheet applications, human resource information systems, and other related systems

MINIMUM QUALIFICATIONS:

EITHER

Experience

Current employment and at least one (1) year of experience as a Senior Recruiter with the San Francisco Bay Area Rapid Transit District.

OR

Education

Possession of a bachelor's degree in business administration, human resources, or a closely related field from an accredited college or university.

Experience

The equivalent of four (4) years of full-time professional experience in employee benefits and/or retirement administration or related experience, which must have included at least one (1) year of advanced journey level (lead) experience in a role comparable to the Senior Benefits Analyst classification at BART.

Substitution

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Additional experience as described above may be substituted for the required education on a year for year basis.

WORKING CONDITIONS

Environmental Conditions

Office environment; exposure to computer screens.

Physical Conditions

May require the physical condition necessary for sitting for prolonged periods of time.

BART EEO-1 Job Group: 3500 – Professionals
Census Code: 0630 – Human Resources Workers
Safety Sensitive: No

CLASSIFICATION HISTORY

Created : September 2023