Duty Statement

Classification: **Investment Officer III**

Position Number: **275-690-4695-014**

HCM#: **2982**

Branch/Section: **Investment Office / Investment Technology & Performance**

Location: **Sacramento, CA**

Working Title: **Investment Data Platform Lead**

Effective Date: **February 1, 2026**

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

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

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

CalPERS is the nation's largest public pension fund with investments in both domestic and international markets. The Investment Office (INVO) invests and manages CalPERS assets. The portfolio invests in stocks, bonds, real estate, private equity, inflation-linked assets, and other public and private investment vehicles. Our goal is to generate total returns on a long-term basis while managing risk. The Investment Technology, Data, & Performance (ITDP) Division is responsible for managing technology and data used to manage the Public Employees' Retirement Fund (PERF) and Affiliate funds. The team seeks to leverage technology and data to create durable processes while also enabling investment innovation.

The Investment Officer III (IO III) is the advanced working and lead level of the classification series. Under the direction and in collaboration with the Investment Manager (IM) or Associate Investment Manager (AIM), the IO III will be responsible for the data architecture framework and platform which includes structure and processes, for managing, support, and providing visibility and access to INVO-wide data assets. The IO III will ensure data accuracy, trustworthiness, timeliness, and enablement to support INVO business operations and decision-making, in alignment with business initiatives and strategies. The IO III will maintain a positive team approach while demonstrating CalPERS' Core Values of Quality, Respect, Integrity, Openness, Accountability, and Balance in accordance with personal work ethic in alignment with CalPERS Investment Beliefs.

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**.**

30% Onsite[1] and virtually, act as lead for collaborating with the Investment Office asset classes and program areas to understand data requirements and goals of the Investment Office, ensuring a successful transition to a data centric organization. Analyze, plan, and define a comprehensive data architecture framework to effectively organize and manage source-of-truth data, in direct support of business objectives, ensuring data quality, and enhancing decision-making. Define and communicate data principles that guide the organization's approach to data management. Design and implement a strategy for data observability to provide monitoring, auditing, and visibility to all data assets. Act as the subject matter expert in translating business use cases into data flows and conceptual/logical data models. Identify and evaluate vendors and technologies in the industry to leverage for optimizing data architecture and modeling. Define and design data models, a master data management strategy, meta data management strategy, central data warehouse and storage designs. Design and implement the data management platform that aligns with overall data architecture and business goals.

25% Onsite[1] and virtually, design and implement comprehensive data governance and management frameworks, including standards and best practices that support the delivery of quality and verified data. Establish/leverage a Data Governance Council or Committee to facilitate decision-making and prioritization of tasks/projects. Define roles and responsibilities for key stakeholders, including Data Owners, Data Stewards, and Data Custodians. Develop data governance policies, utilizing federated models for flexibility and adaptability. Define robust data security and privacy policies to protect data assets. Implement measures for data protection (DLP), and ensure compliance with regulations and standards (e.g., SEIA governance). Develop comprehensive data literacy strategy to empower end users to effectively work with and interpret data. Develop training plans, provide resources for continuous learning and development, to foster a data-driven culture.

25% Onsite[1] and virtually, maintain and support the data management platform. Manage the entire data lifecycle, from acquisition and processing to storage and archival, ensuring data integrity and adherence to established standards. Implement data quality frameworks (data profiling, cleansing), and creating data pipelines according to business use-case and rules, ensuring integration between systems. Set up continuous quality monitoring and auditing processes. Develop an integration strategy, ETL/ELT processes and API management. Ensure data interoperability across systems. Implement metadata management to track and document data lineage, catalog data assets, and enhance data discoverability. Develop a metadata repository for data lineage and cataloging. Manage Master Data to ensure consistency and accuracy of core data domains and assets. Take ownership of data pipelines, monitor for performance and health, actively engaging with stakeholders and vendors to resolve issues or bottlenecks.

10%   Onsite[1] and virtually, work as lead data architect on the Data Team in evaluation, selection, onboarding, and ongoing management of external vendors providing data management tools and services. Collaborate closely with the AIM and Data Team to evaluate, onboard, and manage various data technology solutions, including master data management, data quality, data catalog, data lineage, data integration, data modeling, and analytics tools. Serve as the subject matter expert on the technology and investment data footprint of vendors and systems. Manage the vendor relationships that support investment data which includes contract/subscription negotiations, monitoring of SLA's/KPI's, invoice approvals, and licensing terms. Research data acquisition opportunities.

10%   Onsite[1] and virtually, perform special projects and research as assigned by the Associate Investment Manager, Investment Manager, and/or Investment Director of ITDP.

Working Conditions

- [1] This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Ability to multi-task and prioritize based on changing needs.
- Combination of computer work and team meetings.
- Fast-paced environment; direct interaction with all levels of all assets classes/divisions in INVO.

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**: