



Duty Statement

Classification: **Supervisor I**

Position Number: **275-200-4800-005**

HCM#: **1346**

Branch/Section: **Financial Office, Office of the CFO (OCFO)**

Location: **Sacramento, CA**

Working Title: **Administrative Services Unit Supervisor**

Effective Date: **August 14, 2026**

Collective Bargaining Identifier (CBID): **E48**

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

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

The CalPERS Financial Office (FINO) is responsible for managing all of CalPERS' financial system programs including budgeting, accounting, treasury management, financial planning and analysis, prefunding programs, and pension contracting. In addition to the Supplemental Income Plan Program, the California Employers' Retiree Benefit Trust Fund, and the coordination of the Asset Liability Management program.

Under general direction of the Supervisor II, the Supervisor I provides direct supervision, guidance, and oversight for the Administrative Services Unit in the Office of the Chief Financial Officer (OCFO). The incumbent supervises team members who perform human resources administration, facilities operations, procurement support, technology coordination, records management, and committee operations for the Financial Office. Additional functions include developing policies and procedures, providing customer service support and coordinating projects with internal and external stakeholders.

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, and supervision of work. 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% Onsite¹ and virtually, supervise, guide, and oversees professional administrative team members by assigning work, reviewing progress, and resolving routine and complex issues to ensure delivery of critical business operations that support the Financial Office (FINO). Directs, prioritizes, and monitors team member's assignments related to human resources administration, facilities management, information technology coordination, procurement, business continuity, records management, and administrative support functions to ensure

timely and compliant completion of unit tasks. Reviews team member's work for compliance with departmental policies, state laws, and established service level expectations before completion or submission. Oversees team members who coordinate human resources activities, including recruitment and hiring transactions, position reclassifications, out-of-class assignments, blanket position requests, position pool transfers, organizational charts, duty statement administration, vacancy reporting, eTimesheet coordination, and performance management reporting to ensure accuracy and compliance. Supervises team members responsible for facilities operations, including space planning, mail services, facility requests, badge administration and audits, ergonomic assessments, seating assignments, and records retention activities to maintain safe and functional workspaces. Directs team members who coordinate information technology requests, including PageMaster administration, hardware and software requests, PC equipment and peripheral management, network and system access requests, Outlook and distribution list administration, accessibility compliance, and monitoring monthly compliance reporting to ensure timely and accurate processing. Oversees procurement and fiscal support activities, including expense tracking, operating budget requests, ePro requisitions, purchase order processing, supply inventory management, U.S. Bank purchasing card program administration, business continuity planning, and the Business Insurance Program to support FINO operations. Monitors team member performance, establishes work priorities, resolves complex issues, and ensures the consistent delivery of administrative services that support FINO's operational and strategic objectives.

30%

Onsite and virtually, provides supervision and oversight for unit and branch-wide projects and operational initiatives that support the Financial Office (FINO). Plans, prioritizes, assigns, and monitors projects to ensure timelines are met, alignment with organizational goals are supported, and compliance with departmental policies and applicable laws. Evaluates and streamlines business processes, workflows, procedures, and administrative practices to improve operational efficiency and service delivery. Provides supervisory oversight and directly participates in the development, implementation, communication, and continuous improvement of FINO policies, procedures, standard operating procedures, performance expectations, and administrative processes to promote consistency, accountability, effective internal controls, and compliance with departmental requirements. Develops methods to monitor and assess the effectiveness of new or revised policies, procedures, and performance expectations in meeting customer needs and organizational objectives. Provides input to leadership on the development, implementation, and maintenance of system enhancements and business process automation. Prepares personnel and performance tracking information to support operational needs and inform supervisory decisions. Collaborates with executive and division leadership to identify operational needs, resolve complex issues, implement process improvements, and coordinate team member training on new or revised procedures. Monitors project performance, identifies risks, and reviews deliverables for quality, accessibility, and compliance standards.

15%

Onsite and virtually, provides supervision to team members within OCFO by communicating division and section goals, setting unit priorities and objectives, identifying personnel needs, promoting professional development and succession planning, and responding to team members concerns. Collaborates with branch leadership in process, policy, and procedure evaluation and development. Conducts regular one-on-one meetings with team members to discuss project and task progress, and identify development opportunities. Coordinates with

management and Human Resources, as appropriate, to address personnel issues such as attendance, performance, and training needs. Verifies procedures are followed and ensures team member evaluations are prepared and discussed with them according to established deadlines. Evaluates, trains, coaches, and develops team members under the direct line of supervision. Works with the Supervisor II and Chief Financial Officer (CFO) to identify training needs, tools, and training opportunities to strengthen skills and support team member development through training and assignments.

- 15% Onsite and virtually, provides technical and administrative guidance on FINO's administrative services functions and unit responsibilities by answering team member questions, clarifying procedures, and reviewing work products. Participates in special projects and meetings by completing assigned tasks, preparing materials, and tracking follow-up actions. Coordinates with peers and leadership to apply consistent administrative procedures across the Branch. Provides recommendations to leadership to improve the timeliness, completeness and quality of customer service. Participates in team meetings and assigned work activities to complete unit objectives and goals.
- 5% Onsite and virtually, serves as the back-up by gathering, reviewing, and organizing agenda items for the Finance and Administration Committee (FAC), reviewing for accessibility and accuracy. Organizes and coordinates logistics for committee workshops, interviews, and ad hoc committee meetings, and prepares and distributes monthly agenda packet and meeting materials. Tracks follow-up actions on committee member requests and routes them through the appropriate communication channel. Attends and assists committee members and participants at all committee meetings.
- 5% Onsite and virtually, serves as primary back-up to the Supervisor II, when assigned, to support continuity of FINO operations. Performs other duties as assigned and 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 represent the duties of the position.

Supervisor Signature:_____ **Date:**