



Duty Statement

Classification: **Supervisor I**

Position Number: **275-250-4800-003**

HCM#: **8604**

Branch/Section: **Financial Office/Pension Contracts & Prefunding Programs Division/Pension Contract Management Program/Pension Contract Services/Pension Contracts**

Location: **Sacramento, CA**

Working Title: **Pension Contract Supervisor I**

Effective Date: **January 1, 2026**

Collective Bargaining Identifier (CBID): **S01**

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

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

The Financial Office (FINO), Pension Contracts & Prefunding Programs Division (PCPP) has full responsibility for administration and management oversight of employer retirement and special programs contracts including the California Employers' Retiree Benefit Trust (CERBT), California Employers' Pension Prefunding Trust (CEPPT), Supplemental Income Programs (SIP), and other prefunding programs.

Under the general supervision of Supervisor II of the Pension Contracts Services, Supervisor I performs and supervises team member operational activities of the Pension Contract Unit. This position includes supervision of professional team members working independently in visible, sometimes confidential areas and requires coordination and cooperation with other divisions and external service providers. This position is responsible for procedures, oversight, and control of the Pension Contracts of the California Public Employees Retirement System. The incumbent performs the following responsibilities and duties:

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.

40% Onsite¹ and virtually, supervises Pension Contract team members by assigning work, monitoring progress, and reviewing completed assignments to ensure a high-quality performance related to contract management functions. Develops and tracks workload and resources, delegates workload, and oversees daily operations within the unit. Provides clear direction, evaluates work, and utilizes skill assessment tools to develop team member competencies in the principles of analysis, policies and procedures, and administration.

Provides review for executive-level written reports and recommendations, research best practices, full journey level analysis, and facilitation services related to contract services. Provides technical guidance to team members working with employer contracting issues. Provides team members with business-related best practices and project oversight related to Board, executive, and senior leadership-level written reports. Ensure all documents and communications are uploaded to a secure electronic environment regularly. Review the various forms and documents in Microsoft applications, Adobe, SharePoint, and myCalPERS. Supervises employer-tracking logs to ensure that all documents are executed as required. Onsite and virtually, organizes and monitors education and outreach activities, the CalPERS on-line Pension Contract webpages content to provide accurate and current information, resources and develop implementation plans to effectively respond to workload fluctuations. Supervises and occasionally delivers presentations to internal and external stakeholders in person, by telephone, and via webinars.

30%

Onsite and virtually, coordinates with other divisions within CalPERS to resolve any contracting compliance issue cases, including contract termination cases. Acts as division liaison for the collection and analyzing employer information such as myCalPERS activity, audit issues, media coverage, and delinquencies, to respond to various inquiries. Prepares written executive correspondence to aid responses to inquiries from employers and stakeholders. Coordinates team member participation in cross-divisional discussions related to retirement contracting policies and provides input and recommendations to leadership for review and approval.

Onsite and virtually, mentors, coaches, and guides team members in the development of their knowledge of CalPERS and the Systems and resources utilized to perform their work by providing feedback, answering questions, and identifying development opportunities. Identifies team member training needs and/or training opportunities for improved performance and job satisfaction.

10%

Onsite and virtually, supports upper leadership by coordinating team member input and compiling information used in the development of employer risk models related to the security of the CalPERS PCPP Contract program. Reviews research proposals and policy recommendations prepared by team members in order to advise upper leadership. Provides program updates, identifies operational issues, and contributes input to support alignment of program goals with the CalPERS Strategic Plan and PCPP's Business objectives.

Onsite and virtually, coordinates divisional and cross-divisional projects which may be highly visible and sensitive by assigning work, monitoring progress, and elevating issues to leadership for resolution. Reviews and consolidates business requirements and user needs identified by team members and stakeholders to support leadership decision-making. Oversees project teams, monitors progress, and handles issue resolution, elevating critical issues to leadership for resolution.

Onsite and virtually, provides leadership status updates, project schedules, budgetary updates, reports, and other pertinent information as required. Ensures accurate and timely distribution of CalPERS information.

Onsite and virtually, travel may be required by automobile and/or airplane to attend the annual CalPERS Educational Forum, and to visit regional offices or other venues to consult with employers, which may include overnight stays.

10%

Onsite and virtually, hires, trains, develops, and evaluates team members to maintain

required analytical and technical expertise for unit operations. Works collaboratively with other leaders to coordinate unit activities and share information to support division goals and operational needs. Guides team members to establish and meet performance and developmental goals and objectives, identifies training needs based on performance evaluations, and monitors team member performance. Provides input to leadership on section goals and objectives and implements assigned priorities to support division and department mission and goals.

Onsite and virtually, provides input to division leadership to support the development of the Division's Annual and Business Plans. Implements assigned priorities and monitors unit activities to support achievement of established goals and service expectations. Ensures completion of assigned annual plan objectives and special projects by assigning, monitoring, and reviewing team member work within identified time frames. Provide leadership with status updates, reports, and other pertinent information as required.

Onsite and virtually, participate in PCPP and CalPERS teams, meetings, events, and other related divisional or cross-divisional projects or teams by contributing information, sharing unit updates, and supporting coordination of assigned activities. May oversee project teams, monitor progress, and/or handle issue resolution.

5% Onsite and virtually, supports implementation of division and CalPERS business plans and strategy through coordination of unit activities and reporting on progress.

5% Onsite and virtually, performs other duties as assigned and 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.
- Multi-level office environment. Occasional overnight/in-state travel may be required.
- Sitting, standing, lifting, pushing, and pulling requirements are consistent with office work. The incumbent works in an office setting, with artificial lighting and temperature control. Daily access to and use of the telephone, personal computer, and computer programs/program databases.

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:**