



Duty Statement

Classification: **Manager II**

Position Number: **275-162-4802-001**

HCM#: **3145**

Branch/Section: **Retirement Benefit Services Division / Special Programs Section**

Location: **Sacramento, CA**

Working Title: **Assistant Division Chief**

Effective Date: **September 1, 2026**

Collective Bargaining Identifier (CBID): **M01**

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

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

The Retirement Benefit Services Division (RBSD) supports the processing of retirement benefits for CalPERS participants. In addition to processing requests for these benefits, the division responds to inquiries from members, employers, and annuitants. Other services include adjusting benefit payments, conducting the annual tax reporting process, processing reinstatements, and other post-retirement employment needs.

Under the general administrative direction of the RBSD Division Chief (DC), the Manager II serves as the Assistant Division Chief (ADC) with full management and supervisory authority as the operations manager for RBSD's Special Programs Section, consisting of the Judges' & Legislators' Retirement System (JLRS) and the Warrants & Forms Administration Teams. This position manages the Supervisor II responsible for oversight of the Warrants & Forms Administration, and the Internal Revenue Code (IRC) 415b Processing teams, and the Supervisor II over the Judges' & Legislators' Retirement System (JLRS) team.

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, plan, organize, manage, and direct the major functions for the Warrant Administration & Forms and JLRS sections. Manage, administer, and act with signature authority for the Chief in a variety of delegated matters critical to the division's main mission of providing quality service to our employers and customers through timely processing of all

requests and direct assistance, counseling, and education on related programs administered by the CalPERS System. Make recommendations to the Division Chief on work prioritization, streamlining or eliminating redundancies, and strengthening business processes. Ensure that projects identified in the Division's Annual Plan and other division-specific key objectives and strategic initiatives are achieved and that the operational programs perform their functions consistent with CalPERS goals and objectives.

- 30% Onsite and virtually, act in the absence of the DC to direct the activities of the Special Programs section; represent the DC at meetings of the Board of Administration, senior leadership meetings, and before employer and employee organizations and third-party administrators regarding the division's programs and operations. Manage the oversight of activities involving RBSD's participation in enterprise-wide meetings and projects.
- 15% Onsite and virtually, act as the subject matter expert on division programs and as liaison with other divisions and the Executive Office by providing executive-level consultation to the Division Chief, Executive Office, and partner divisions on assigned program operations, policy implementation issues, escalations, and operational impacts. Work with the Chief and the leadership team to develop program direction plans, workforce and resource allocation strategies, implementation milestones, and risk-resolution approaches. Direct the review, operational impact analysis, implementation planning, communication, and monitoring of legislative changes affecting these programs in the division to ensure timely implementation. Serve with decision-making authority on the most sensitive projects where a high degree of expertise and organizational knowledge are needed.
- 15% Onsite and virtually, plan, organize, manage, and direct a variety of critical special projects and/or workgroups across all programs and functions throughout the RBSD and/or CalPERS. Reallocate priorities, team member and work assignments, and resources to address project risks, workload demands, implementation deadlines, and operational impacts for assigned special projects and workgroups.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- This position may require travel for CalPERS sponsored events or conferences.

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:**